



Exclusively for WFG

Everest Funeral Concierge Service

Your clients have already made the important decision to look after their family with life insurance, now there is help with making challenging decisions when dealing with the emotions of a death in the family, as an added value.

As part of an ivari prosperity Universal Life insurance policy* clients now have access to Everest Concierge Services to help plan for and deal with a funeral.

Everest can help simplify the funeral process and eliminate the confusion of funeral options for clients with:

- **Online planning tools**, including *Everest's PriceFinder Report*, can be accessed at www.everestfuneral.ca/enroll

Note: An enrollment code will be provided in your client's Everest welcome package.

- **Knowledgeable staff** – available 24 hours a day, every day of the year to serve you and your family. *Everest Advisors can be reached toll-free at 1-800-913-8318.*

*Please refer to program overview for full details. The Everest service is only available if the prosperity UL policy is in effect. Everest Funeral Concierge Service is non-contractual.



24/7 Advisor Assistance

- Assist with any funeral related issues
- Serve as a consumer advocate for the family
- Everest is not associated with any funeral home, burial or cremation provider



Online Funeral Planning Tools

- Includes: Personal Profile, 10-Key Decisions Planner, "My Wishes" Planning Guide, and Reference Guide
- Information stored and maintained in our secure data warehouse



Everest PriceFinderSM Research Reports

- Detailed, local funeral home price comparisons available on-demand via our website



At-Need Family Support

- Family Assistance and Plan Implementation
 - Communicate the client's Personal Funeral Plan to the funeral home; removing the family from a sales-focused environment
 - Provide 24 hour assistance throughout the funeral process
- Negotiation Assistance
 - Gather pricing for services and merchandise and present to client in an easy-to read format
 - Negotiate funeral service pricing with local funeral homes



TenzingTM

- A secure, cloud-based data vault for storing personal information



Will Prep

- Create a Will, Health Care Directive, and Power of Attorney
- Customized legal documents using our online system
- Save, print, and sign

Note: Will Prep is not available in Quebec.

Everest Canada is the service provider of the Everest Funeral Concierge Service available with ivari prosperity UL policies. ivari and its affiliates are not responsible in any way for the products or services offered by Everest Canada or any of its affiliates.

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