

Everest Funeral Concierge Services

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.

By providing their opt-in consent, the insured under an ivari prosperity Universal Life™ insurance policy* has 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 your client and their 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.

ivari Universal is not available for Everest Services.



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 Everest's secure data warehouse.



Everest PriceFinderSM Research Reports

- Detailed, local funeral home price comparisons available on-demand via Everest's 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



Tenzing™

- 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 Everest's online system
- Save, print, and sign

Everest Funeral Concierge Services is non-contractual and is subject to program availability.

Everest Canada LLC is the sole provider of the Everest Funeral Concierge Services (24/7 Advisor Assistance, Will Prep, Tenzing, and PriceFinder) available with ivari prosperity Universal Life policies. ivari is the sole provider of the Quick Pay benefit and reserves the right to revoke the Quick Pay benefit any-time at its sole discretion, subject to the terms and exclusions set out in the policy. ivari and its affiliates are not liable for the quality or availability of the products or services offered by Everest Canada LLC or any of its affiliates. Everest is not an agent or broker of ivari.

Everest Funeral Package, LLC, EA Financial Services, Inc. and their respective affiliates have no affiliation with Everest RE Group, LTD., Everest Reinsurance Company or any of their affiliates.

Neither Everest nor any of its affiliates are responsible in any way for the products or services offered by any companies with which Everest works or in which Everest's services are co-marketed, nor are any such other companies responsible in any way for any services offered by Everest and its affiliates.

Everest and the Everest logo are service marks of Everest Funeral Package, LLC. Everest PriceFinder is a service mark of Everest Information Services, LLC. Tenzing is a trademark of Everest Funeral Package, LLC.

Will Prep is not available in Quebec, the Yukon, the Northwest Territories and Nunavut.

Everest's Services are not available in Thunder Bay.

™ ivari, the ivari logos, and prosperity Universal Life are trademarks of ivari Holdings ULC. ivari is licensed to use such marks.

A service provided by

