Final Roadmap

the toolkit for peace of mind at end of life

An Essential Tool for Financial Planners

final roadmap℠

the toolkit for peace of mind at end of life

www.finalroadmap.com

control

Final Roadmap is the only end of life planning tool that allows your clients to communicate **healthcare**, **financial** and **personal wishes** selectively, securely and with absolute control.

"It's always too early to have the conversation, until it's too late."

- Ellen Goldman
National Hospice and Palliative Care Conference
Washington, DC
April 2013

Final Roadmap was created to make end of life planning easier, manageable and affordable. The Toolkit allows members to create, compile and safely store documents and directives – with the option to share the documents they select, with the individuals they choose, in the equivalent of an ultra-secure electronic vault.

trust

And for those who want to have peace of mind, Final Roadmap provides a comforting ‘tour’ of those questions and wishes that may be on their mind but never yet expressed.

Why Financial Planners Value Final Roadmap

Any Financial Planner knows the complexities involved in helping clients prepare for their future. Final Roadmap helps break down the often overwhelming process of end of life planning into small, manageable steps.

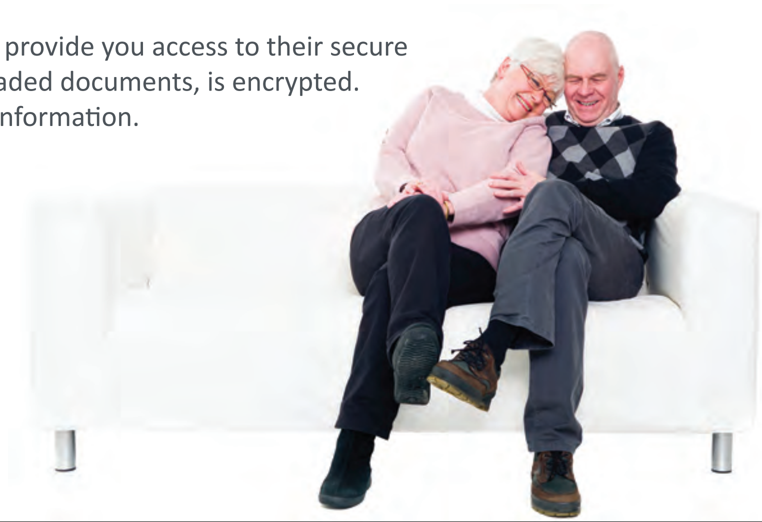
When you recommend Final Roadmap to your clients, you will:

- Enhance client retention and add value to your client offering, positioning your firm as a trusted advisor, rather than just a service provider.
- Enable your clients to have access to a single depository for all of their important papers and legal documents, including wills, advanced directives, healthcare proxies, deposit and securities accounts, etc.
- Benefit from clients being better prepared and organized in advance, thereby saving you (unbillable!) time and money spent sorting through all of those unorganized documents.

What About Security?

Final Roadmap employs the same internet security measures used by banks, credit card companies, and government agencies.

As an authorized “designee” your client may provide you access to their secure virtual vault. All information, including uploaded documents, is encrypted. No one else can access your clients’ private information.



The Six Sections of the Final Roadmap Online Toolkit

Medical Care

This section is designed to help members think through common medical decisions and situations that relate to the end of life. The forms included will be useful when members complete and distribute them to anyone who might make decisions on their behalf. These medical care forms can become part of their legal advance directives.

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Legal & Financial

Final Roadmap strongly recommends to clients that their documents are carefully prepared by an experienced, licensed estate attorney. This section pertains to the legal and financial facets of planning for the end of life and contains information that allows members to organize and evaluate the status of legal and financial holdings and determine whether they need to create or update legal documents and/or financial plans. The legal portion of this section points members to review their estate planning documents as well as other legal documents they may have in place, e.g. living will, advance directives, durable power of attorney for healthcare. The section also will direct them to consider the state of their financial situation in regard to accounts, assets and liabilities. Any and all of legal and financial documents may be uploaded and securely filed in the member's virtual electronic vault.

Physical Death

This section encourages members to consider death as a physical event that typically lasts minutes, hours or days. Often, it is hours or days and can be predicted by healthcare and/or hospice providers. In these instances, documenting their wishes will make physical death a calmer experience for them and their loved ones.

Visitation/Services/Remains

This section of Final Roadmap encourages members to thoughtfully and fully consider and communicate wishes for gatherings that include loved ones and others who knew them. Home visitation, shiva, wake, funeral or other services as well as disposition of physical remains such as burial or cremation are covered here.

Messages

In the messages section members can attach letters, audio, and/or video for as many individuals or groups as they wish. Or, they can write their thoughts in narrative form to be distributed on or before their death.

Death Notifications

This section provides members the opportunity to create a notifications list, and create the language they would like used in these communications.

"People who have substantive discussion... about their end of life preferences were far more likely to die at peace and in control of their situation, and to spare their family anguish."

- Atul Gawande, MD
Letting Go
The New Yorker
August, 2010 prepare

Who Should Have a Final Roadmap?

- People who value preparation and thorough planning
- Healthy adults planning their financial future
- Anyone experiencing a significant life milestone--marriage, divorce, parenthood, adoption, new job...
- Any person with real health concerns

Make the Planning Process More Manageable for You AND Your Client

You're already having important conversations with your clients about their future. These conversations can be complicated and emotionally overwhelming for many clients. Final Roadmap can be your most important tool in getting it all organized, readily accessible, and digestible by your client. The BEST time to introduce Final Roadmap can include the following:

- When a client's spouse dies
- When making plans for college savings, trust funds, or retirement
- When there's a marriage (or divorce!) in the family
- When a child or grandchild or even great grandchild is born
- When your client has received an inheritance
- When your client's tax bracket changes
- When your client has written or updated a will or trust document

Whenever the time, introduce the topic with the same straightforward, professional tone you use when you discuss planning for the future.

Your client counts on you for sound, informed advice, and will thank you for your candor and thoughtfulness.

For Your Clients, and Your Practice

To learn more about how Final Roadmap can benefit both your clients AND your practice, please visit www.FinalRoadmap.com.

To learn about multi-unit or bulk purchases, as well as private labeling options, please contact Steve Byrne, Co-Founder, directly.

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