

THE BEYONDWILL CLIENT GUIDE

ESTATE PLANNING, MADE SIMPLE FOR THE PEOPLE YOU LOVE

Start tonight, in plain language, and keep it right as life changes. About an hour at your kitchen table, not six months and a \$5,000 retainer.

A WELCOME & GETTING STARTED GUIDE · BUILT WITH YOUR
ADVISOR

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We're glad you're here.

You've taken an important step toward protecting the people who matter most. Whether you've been meaning to create a plan for years, or you're updating one that no longer reflects your life, BeyondWill is here to help you do it with *clarity, confidence, and care*.

Estate planning can feel overwhelming, but it doesn't have to be. We built BeyondWill to guide you through the process step by step, in plain language, at your own pace. You don't need to know where to begin. **You just need to begin. We'll take it from there.**

Along the way, we'll ask about your family, your wishes, and what you own. Your answers help us create a plan that not only meets legal requirements, but also reflects the values, people, and legacy you want to protect.

You're not doing this alone. Your advisor is here to support you, and so is our team. If you have questions or need help, just reach out. We're honored to be part of this with you.

The BeyondWill Team

support@beyondwill.co · info.beyondwill.co/support

PART ONE

BEGIN

Getting started

What estate planning really is

An estate plan protects the people and things you love. It outlines who can make decisions for you if you're unable to, and how your wishes are honored after you pass.

A will or trust is part of it, but a complete plan also includes powers of attorney, healthcare directives, and up to date beneficiary designations, so everything aligns with your intentions. Have no fear if you don't know what those words mean, there's a glossary, starting on page 19 of this guide.

WHY IT MATTERS

- Protects your family if something happens
- Makes things easier on loved ones during a difficult time
- Keeps courts out of private family decisions where possible
- Reduces delays, fees, and conflict

SOMETHING OFFICIAL BEATS NOTHING

A real plan covering the essentials tonight is worth far more than a perfect plan you never finish, and it only gets better as life changes. **Cover the essentials now, refine as life changes.**

How BeyondWill goes beyond documents

We believe estate planning is more than a set of legal documents. It's the care, clarity, and meaning you leave behind. With BeyondWill, you get:

- **A secure vault**
Organize the key documents, contacts, and instructions your executor will need, all in one place.
- **Ongoing updates as life changes**
Gentle reminders to review and refresh, so your plan keeps up with your life instead of gathering dust in a drawer.
- **Legacy tools**
Capture the stories, values, photos, recipes, and final wishes that make you who you are.
- **Advisor connectivity**
Your advisor stays in the loop, so you're covered twice, never doing this alone.

Getting started

You've been invited by your advisor to create your estate plan on BeyondWill. There's nothing to download and no legal jargon to decipher. Just log in, follow the simple steps, and we'll guide you through everything at your own pace.

HOW TO BEGIN

1

Open your invitation email

Click "Get started" from BeyondWill. No email yet? Check spam and if it's still not there, ask your advisor to re-send the invite.

2

Create your account

Choose a password and follow the on-screen instructions.

3

Begin building your plan

Your advisor is available whenever you have questions or need support along the way.

Your plan, your pace

BeyondWill guides you step by step. Along the way, we'll ask about:

**Your family and
the people you
trust**

**What you own,
and how you'd like
to pass it on**

**Who decides if
you're ever unable
to**

There's no need to have all the answers up front. Your progress is saved automatically so you can return at any time. **This isn't homework.** It's about an hour, which we guide you through, with nothing to study.

BEFORE YOU START

Having key information on hand makes the process faster and more personal. You can always save and return later, but preparing in advance helps you move through each step with ease, and the more complete your information, the more accurate your plan. You'll also be able to upload documents and let **WiseFill™** extract the details for you (see page 14). The next few pages are a checklist to help you gather what you need.

Your estate planning checklist

A few documents and decisions you might want to have on hand as you begin. Don't worry about having everything. Start with what you can find today.

DOCUMENTS

- ☐ Driver's license
- ☐ Federal tax return
- ☐ Bank & financial account statements
- ☐ Existing will or trust documents
- ☐ Insurance policies
- ☐ Real estate documents
- ☐ Vehicle documents

DISCUSSIONS & DECISIONS

- ☐ Who will be responsible for caring for children, pets, and aging parents under your care?
- ☐ Who will be your executor and make sure your wishes are carried out?

BANK-LEVEL SECURITY

Your data is double-encrypted and vaulted with bank-level security to keep it accurate and private.

What to gather

A friendly overview of the information that helps us build your plan. Gather what you can; you can always add the rest later.

PEOPLE & ACCOUNTS

BASIC INFORMATION

Legal names, Social Security numbers, and current contact details for everyone in your household.

GUARDIANS

Who you'd trust to care for children, pets, or dependents, along with their contact details.

INVESTMENTS

Brokerage, retirement (401(k), IRA, Roth, SEP), HSAs, 529s, stocks, annuities, and the like.

FAMILY & BENEFICIARIES

Details for your spouse and the friends, family, or others you'd like to provide for, including pets, their care, and vet info.

BANK & CASH ACCOUNTS

Checking, savings, CDs, money market, and credit-union accounts, with institutions and balances.

CHARITABLE GIFTS

Any organizations you'd like to support, with their contact details and EINs.

What to gather · continued

PROPERTY & BELONGINGS

REAL ESTATE

Properties you own, deed locations, ownership structure, and any mortgages or rentals.

VEHICLES

Cars, boats, and other titled vehicles, with locations and approximate values.

SAFE DEPOSIT BOXES

Where they are, who's authorized to access them, and where the keys live.

INSURANCE

Life, disability, long-term care, property, and umbrella policies, with their policy details.

BUSINESS INTERESTS

Business name, structure, EIN, and key contacts, if you own a company.

OTHER VALUABLES

Heirlooms, collectibles, firearms, intellectual property, and anything with special meaning.

YOUR DECISION-MAKERS

EXECUTORS & AGENTS

A few people you'd trust to act as executor, power of attorney, and healthcare agent, with their contact info.

TRUSTEES & WISHES

Successor trustees (if you choose a trust), thoughts on who receives what, and decisions like organ donation.

PART TWO

CHOOSE

Your plan

Choosing your plan

No estate planning knowledge needed. We start by gathering the essentials (family, assets, wishes, and priorities), so by the time you choose, you'll have the clarity to pick what fits. There's no pressure to choose before you're ready.

WILL-BASED

Name guardians, choose decision-makers, and direct who receives your assets. Your will goes through probate.

INCLUDES

- Last Will & Testament
- Durable Power of Attorney
- Healthcare Power of Attorney
- Living Will (Advance Directive)
- HIPAA Release Authorization

TRUST-BASED

Everything in a will-based plan, plus a Revocable Living Trust to help avoid probate, keep things private, and speed up access. It's ideal for property in multiple states or more complex situations.

ADDS

- Revocable Living Trust
- Pour-Over Will
- Certification of Trust

WHAT IS PROBATE?

Probate is the legal process after someone passes: how a court confirms a will is valid, settles debts, and distributes assets. A will keeps your wishes in charge; without one, the state decides. A trust-based plan can help your loved ones skip probate entirely, saving time and keeping things private.

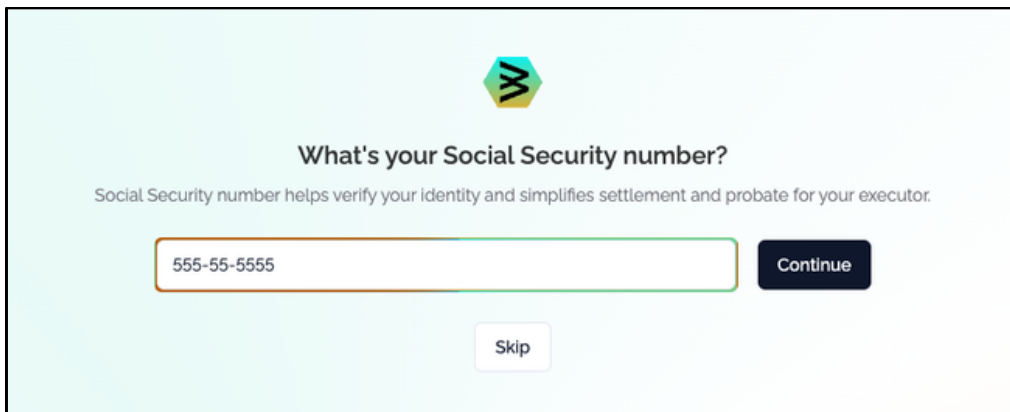
WiseFill™

Create your plan faster with what you already have

Creating or updating a plan doesn't have to start from scratch. Upload documents you already have, like a previous will or trust, an insurance policy, a bank statement, or your most recent tax return.

BeyondWill reads those documents, extracts the relevant information, and auto-populates your profile so you can build or update your plan more quickly and accurately.

Every pre-filled field is clearly highlighted for you to **review, confirm, and update** if needed. This can save you hours.



The screenshot shows a light blue interface with the BeyondWill logo at the top. Below the logo, the text "What's your Social Security number?" is displayed in bold. Underneath, a smaller line of text states: "Social Security number helps verify your identity and simplifies settlement and probate for your executor." A text input field contains the placeholder "555-55-5555" and is highlighted with a green border. To the right of the input field is a dark blue "Continue" button. Below the input field is a light blue "Skip" button.

PART THREE

BEYOND

More than documents

More than documents

Every plan includes a BeyondWill exclusive: the **Executor Summary** (or **Trustee Summary** for trust plans): a practical guide designed to make life easier for loved ones during an already difficult time. Each summary brings together:

- Account numbers and policy details
- Storage and access notes for critical files
- Contacts for guardians, beneficiaries, and key institutions
- Personalized instructions to minimize confusion

MORE THAN MONEY

Your legacy is more than a list of assets. BeyondWill helps you capture your values, beliefs, family traditions, and even the recipes and stories you want to pass down, the things that provide comfort and clarity to the people you love. The best thing you leave isn't money; it's not leaving them guessing.

When your plan needs more support

BeyondWill is designed to handle most estate planning needs. But some situations, like long-term care for someone with special needs or advanced tax planning, call for more advanced legal work.

If that's the case, we can refer you to a trusted estate planning attorney. You'll get a shortlist based on your needs and location, choose who to work with, and pay them directly. We guide you through the handoff to share what you've already entered, so you don't start over, and we keep everything current and shared with your attorney going forward.

Important: BeyondWill is not a law firm and does not provide legal advice. If legal guidance is needed, we recommend consulting a licensed attorney.

Plans evolve as life changes

Your plan should reflect your current life. Add a new family member, change your wishes, or update your assets any time. BeyondWill reaches out about once a year to check that your information is still right, and you can log in and request an update whenever you like. A team member will guide you through it so every change is properly reflected. **Start tonight; stays current as life changes.**

Your information is protected

We know estate planning is personal. That's why we use bank-level encryption and strict security controls to keep your information safe. All of your data is:

- Encrypted from the moment you enter it to the moment we save it in the cloud
- Stored securely in our private cloud environment
- Protected from third-party AI systems and public models, and never sold

NEED HELP?

We're here whenever you have a question.

Visit our Help Center for answers to common questions, or contact our support team directly. Estate planning is personal, and you're never doing it alone.

info.beyondwill.co/support

Glossary of terms

Plain-language definitions for the words you'll come across as you build your plan.

No jargon, no pressure.

WILLS AND TRUSTS

ESTATE PLAN

The full set of documents and decisions that protect you and your loved ones, in life and after you're gone.

WILL (LAST WILL AND TESTAMENT)

The document that names guardians and an executor and directs who receives what you own.

TRUST

A legal arrangement in which a trustee holds and manages assets for the people you choose.

REVOCABLE LIVING TRUST

A trust you control and can change while you're alive, often used to help loved ones avoid probate.

POUR-OVER WILL

A short will that moves anything left outside your trust into it after you pass.

Glossary continued

MORE DOCUMENTS

CERTIFICATION OF TRUST

A brief summary that proves your trust exists without revealing its private details.

POWER OF ATTORNEY

A document that lets someone you choose act on your behalf for financial or legal matters.

DURABLE POWER OF ATTORNEY

A power of attorney that stays in effect if you become unable to make decisions yourself.

HEALTHCARE POWER OF ATTORNEY

Names the person who can make medical decisions for you if you cannot make them yourself.

LIVING WILL (ADVANCE DIRECTIVE)

States the medical care you do or don't want if you can't speak for yourself.

Glossary continued

PEOPLE AND ROLES

EXECUTOR

The person who carries out your will, settles your affairs, and distributes your assets.

BENEFICIARY

A person or organization you choose to receive assets from your plan.

TRUSTEE

The person or institution that manages the assets held in your trust.

GUARDIAN

The person you name to care for your children or dependents if you can't.

SUCCESSOR TRUSTEE

The person who steps in to manage your trust if you're unable to or after you pass.

Glossary continued

GOOD TO KNOW

HIPAA RELEASE AUTHORIZATION

A form that lets the people you name see your medical information when they need to.

BENEFICIARY DESIGNATION

An instruction on an account or policy naming who receives it, which passes outside your will.

PROBATE

The court process that confirms a will, settles debts, and distributes assets after someone passes.

INTESTATE

Passing away without a valid will, which leaves the state to decide who receives what.

EXECUTOR SUMMARY

Also called a Trustee Summary for trust plans. A BeyondWill guide of account details, contacts, and instructions for loved ones.



Protect what matters most.

Start your plan tonight, give your family clear guidance, and keep it right as life changes.

Start at app.beyondwill.co

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