



Financial
Concierge

Family Playbook™

Secure Document Organization Template

Lighten the Load for Your Attorney or Executor Family Member

Of 14.8 million Canadians aged 45 or older, 99% intend to name a friend or family member as their executor. (Stats Canada, BMO Leger Survey). And most Canadians choose family members as their attorneys under Powers of Attorney (POA) for property and personal care.

Family Member Appointed as Attorney or Executor? Did you know:

- ✓ Depending on complexity, it can take 100 plus hours to settle an estate
- ✓ Generally takes up to 18 months to settle an estate
- ✓ An executor role has legal and personal financial risks
- ✓ Your will and POA documents do not provide essential financial and personal information required to manage your affairs and administer your estate

Set Your Attorneys and Executor Up for Success

Set your attorneys and executor up for success by organizing your important information in one place using our self-serve Family Playbook™ housed in a secure platform with SideDrawer™



Benefits for Loved Ones

- ✓ Save them 40 plus hours trying to locate required information
- ✓ Unburden them from the stress of trying to guess your wishes
- ✓ Easy secure access to probate required information– allowing faster access to the estate's accounts

Benefits for You

- ✓ Efficient and speedier estate settlement
 - ✓ No overlooked bank/investment accounts or insurance policies
- ✓ Peace of mind knowing your financial affairs, personal care, end of life care and estate settlement will be in accordance with your wishes

Our Family Playbook™ is a **lifeline for your attorney/executor family members.**