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MATT MURPHY

CLIENT: Elder Life Group

PROJECT: Brochure

OBJECTIVE: Develop print copy for a financial-services provider targeting estate attorneys

SUMMARY: Having already created multiple consumer-facing brochures, I was retained for a B2B version intended to expand Elder Life Group's national network of attorney partners

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ELDER LIFE
GROUP®

Outsourcing Funding

Cut Your Costs While Reducing Your Risk

A Message From Our Founder

Dear Estate Planning Attorneys,

Well-crafted trusts are customized to each client, but there are two universal truths that apply to every one of them: they have to be properly funded, and doing this takes time.

As founder of Elder Life Group, I understand the critical, yet tedious nature of finalizing this paperwork. I know how it can often divert attention from areas that actually build your business.

Well, my team and I are here to help.

We like to tell our beloved seniors that we're in the "peace of mind business," but this goes for our partners as well. Outsourcing your trust-funding to Elder Life Group lets you focus on other key tasks while knowing your clients—and your reputation—are in good hands as the process comes to a close.

Attorneys around the country have found this to be the simplest way to enhance their customer service and their operational efficiency at the same time.

We welcome the opportunity to discuss how we can provide the same expert support to your team as well.

Sincerely,

Scott A. Moan, LUTCF
Founder and Managing Director, Elder Life Group

ELDER LIFE GROUP®

Your Clients' Trusts Must Be Funded

Asset protection benefits everyone

An unfunded trust is a liability waiting to happen. Even if this is the client's responsibility, we believe supporting them here is essential in any scenario. This ensures their assets are titled properly when executing asset-protection planning and reflects positively on your brand and people.

The Importance of Protection:

Power of protection does not happen until each asset is fully funded.

Our Aging Population:

Seniors are vulnerable and can be easily overwhelmed. They deserve a world-class "hand holding" experience from those they look to for help in their golden years.

Your Strength as Their Resource:

Funding can be an afterthought for some firms, but it doesn't have to be. Outsourcing relieves you of risk and responsibility while still offering your clients the kind of reassurance that comes with a holistic estate planning experience.

About Our Trust-Funding Specialists

We formally launched trust-funding services in 2019 with the acquisition of Delco Estate Planning, our country's largest distributor of the Medicaid exempt funeral trust. However, our team has long been recognized for its expertise in crisis financial planning for our beloved senior population. When you partner with us, you don't work with paralegals. You work with specialists who go well beyond merely processing paperwork by actively helping families navigate asset protection.

Our funding coordinators are licensed agents across the US and highly competent in Medicaid, Medicare, insurance, and finance. They undergo yearly ethics, product, and anti-money laundering training to maintain exacting professional standards. Their comprehensive understanding of assets lets them quickly identify red flags that could affect planning strategies.

We Simplify Funding for You and Your Clients

Funding doesn't have to be complicated. Our clients count on us for our expertise in pre-planning and funding newly-created asset-protection trusts. We work collaboratively with you and your financial advisors toward our mutual goal: provide the best care for those who deserve it most.

Count on Elder Life Group

CAPABILITY

Our deep expertise in financial planning lets you confidently transfer funding liability knowing your clients will be in the best of hands.

INTEGRITY

Trust is the foundation of any relationship, which is why the way we do business with our valued partners is just as important as the business we do for them.

CONSISTENCY

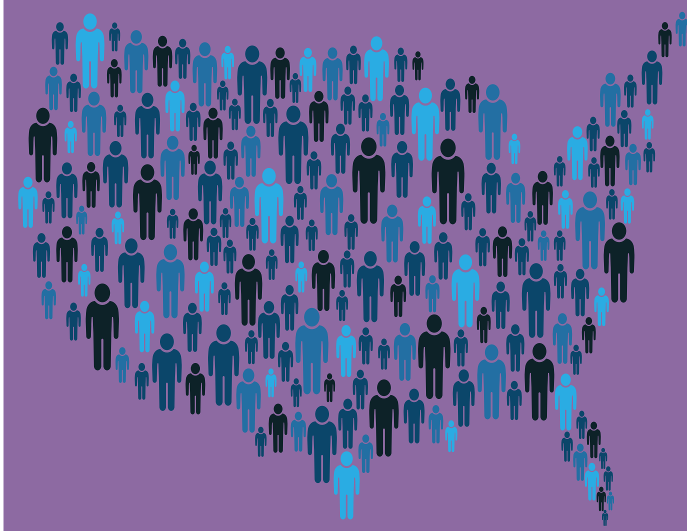
We offer all of our law firm partners, their networks, and their clients the same attention and thought leadership day in and day out, period.

Frequently Asked Questions

What should my network of financial advisors expect working with a financial organization like yours?

Your relationships are of the utmost importance to us, and we would never do anything to compromise them. Furthermore, working with financial advisors is our specialty. With over 3,000 advisors in our network, we collaborate with some of the largest broker-dealers throughout the US. We advocate on your behalf, and our role as "quarterback" ensures your clients' assets are fully funded in accordance with the plan you've already set into motion.

3,000 Advisors Across the Nation!



Do you fund homes, airplanes, vehicles, boats, or other forms of transportation?

No. We leave deed and title matters to the law firm so we can focus on working with financial institutions and advisors.

Do you fund bitcoin or digital currency?

Not at this time. However, this can be included in your client's portfolio when confirmations are received. We have proprietary funding documentation at our disposal.

Are you able to support me remotely if I'm not located in Wisconsin?

Yes. We have a fully-integrated virtual platform to fund trusts and estate plans. Our state-of-the-art CRM system offers a secure portal to exchange client-sensitive or confidential documents.

Elder Life Group is a national company with a local presence. With over 3,000 advisors in our network, we offer expert support to clients and their attorneys in every corner of the country.

Headquarters in Janesville, WI

(877) 336-7782

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elderlifegroup.com

The Power Of Outsourcing With Elder Life Group

We Protect Your Clients and Your Business as
The Industry's Preferred Partner in Asset Integration

Offer Better Service to Your Clients

Prompt trust funding to ensure asset protection is time-consuming. By taking this off your plate, we eliminate the bottleneck created by clients who need hands-on support, not to mention the "upset and confused" calls you get from clients meeting with financial institutions. This frees you up to better support other clients in key stages of the estate-planning process as well as build new business with those who are just getting started.

Deliver Premium Expertise at Every Step

You do outstanding legal work. We do the same thing on the financial side. Your clients have earned the most qualified support along their entire journey, and that's what we're here to provide. Our advisors support their financial goals and ensure the exceptional plan you designed is fully implemented. Your firm is assured of an in-depth understanding of funding that fully supports your planning strategy.

Protect Your Reputation

An unfunded trust is no better than the paper it's written on. Nothing is worse for the client-attorney relationship than having a plan fall apart due to lack of funding. We make sure this doesn't happen. Our team has been helping firms get their clients across the finish line for years. Together, we fulfill a critical promise to seniors that their assets will be protected.

Minimize Your Fixed Expenses

As you know, funding trusts is expensive. Allocating and re-titling assets creates more internal overhead and less opportunity for generating revenue. By bringing on our specialists, you inherently improve your budget strategy. Your staff can focus on what it does best along with tasks such as marketing, community advocacy, and networking to build your brand. Particularly when revenue ebbs and flows, we can help you be more efficient with your payroll.

Strengthen Your Firm Even Further

The level of support our seniors receive depends directly on the quality of their advisor network. We' re dedicated to maximizing that quality in any way we can at every stage of their journey.

This includes helping you finalize the asset-protection plans you' ve created for your clients so that you can spend time helping others get started on theirs.

Contact us today to see how our funding services improve your value proposition, remove your liability, and free up your team to focus on generating more revenue.

Together, we can enhance your business and your clients' quality of life.

To discover more, call (877) 336-7782
or email us at info@elderlifegroup.com
for more information.
elderlifegroup.com

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Elder Life Group is a leading financial services provider specializing in healthcare and retirement planning. Our advisors work with law firms, insurance professionals, and financial institutions across the country to protect our valued seniors from the high costs of aging.
We find options, you find peace of mind.

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