

TriCert Investment Counsel

EstateKeeper®

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Leave Memories, Not Mysteries.™



Organize, store and share your legacy with EstateKeeper®



EstateKeeper®

Proactive life planning

Imagine if tomorrow never comes—would your loved ones be equipped to handle your affairs? Do they know the whereabouts of crucial documents? Many individuals find themselves unprepared for life's certainties. The lack of guidance and access to vital information could burden your family with numerous hours of effort and significant financial expense.

Wills, POA instructions, insurance policies, personal messages, and financial plans. These are only a sample of the information you can organize, store, and share with EstateKeeper®.

Don't postpone it to the final moments

When the inevitable occurs, EstateKeeper® assists your family, loved ones and advisors with access to vital information. EstateKeeper® guides you step-by-step in creating a single location to securely store and selectively share information with the appropriate individuals.

Securely organize, store, and share your vital information with loved ones and professionals.

How does it work?

EstateKeeper® is your personal guide and secure virtual filing cabinet that will help you organize your legacy and be a resource for your loved ones. Store and share important financial and private information, securely and selectively.

How secure is it?

Every document or file that passes through EstateKeeper® is secured with bank-grade encryption. The platform utilizes the latest in security protocols and processes to ensure privacy and data security for your information when it's stored and when it's being shared.

How can I get access?

Contact your financial advisor to receive an invitation to EstateKeeper®. From there, we'll guide you step-by-step to organize, store and share your legacy.

**Get
Access!**

To gain access to EstateKeeper® and begin collaborating, contact Laura Long, CFP®, at 519-291-4803 ext. 2709 or email laural@w-u.on.ca.



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