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## **Everplans and Redtail Announce Relationship to Deliver Streamlined End-of-Life Planning Technology to Advisors**

*First financial services integration for  
Everplans Professional since launch in June 2015*

**New York (Nov. 4, 2015)** – [Everplans](#) and [Redtail Technology](#) today announced a new relationship and completion of initial integration that will assist financial advisors, insurance professionals, CPAs, and attorneys as they support their clients with end-of-life planning. Everplans is a ground-breaking technology that gives financial professionals the additional tools they need to help their clients organize, store and share all their legal, financial, healthcare, personal and digital information – all in one, convenient place. Redtail is a leading provider of web-based Client Relationship Management (CRM), paperless office, and email archiving solutions in the financial services industry. This is the first integration made available to the financial services market since launching the Everplans Professional platform in June 2015. The announcement was made today at the T3 Enterprise technology conference.

With this integration, advisors currently utilizing the Everplans Professional technology can populate client account information from Redtail CRM into the Everplans platform. In the future, Everplans and Redtail plan to expand their integration by populating a client’s end-of-life plan with up-to-date investment account information through a single sign-on solution.

### **ELIMINATING MANUAL DATA ENTRY**

“Redtail is widely recognized as an innovative solution provider and leading CRM in the financial services industry. We are thrilled to be working with them and taking this first step in our collaboration,” said Abby Schneiderman, co-founder and co-CEO of Everplans. “End of life planning can be overwhelming – even for advisors. Everplans is working to help advisors simplify the process with intuitive workflows and thousands of articles to educate an advisor’s client. By making the process simpler and eliminating manual data entry leaves advisors more time to engage in important and meaningful conversations.”

“One of our primary goals is to provide Redtail users not only with a world-class CRM but with a tool that will help them both add value and extract value from relationships with their clients,” said Brian McLaughlin, CEO of Redtail Technology. “Everplans is an innovative new technology that is helping

advisors do just that. We are very pleased to be the first integration partner in Everplans' ongoing evolution within the financial services industry.”

## **SURVEY REVEALS OPPORTUNITY**

A recent study released by [Everplans](#) identified growing opportunities for financial advisors to assist consumers with their end-of-life planning. Over 95 percent of respondents agreed that some type of help would be valuable in creating such documents.<sup>1</sup> Another area in which nearly everyone surveyed agreed (97 percent) is the importance of storing these important documents in a safe and easily accessible location where their loved one could find them if they needed them.<sup>1</sup>

Advisors looking to help clients fill the gaps in end-of-life planning can visit [www.everplans.com/professional](http://www.everplans.com/professional) and schedule a one-on-one online demo of the tool and integration. T3 Enterprise attendees can stop by the Redtail booth to learn more or place an inquiry through [corporate.redtailtechnology.com](http://corporate.redtailtechnology.com).

## **ABOUT EVERPLANS**

Everplans is the leading online platform helping people create, store and securely share all of the important plans and information their family will need today and someday. Through a combination of original content, a personalized guidance engine, and an intuitively organized digital vault, Everplans helps people create a whole life and legacy plan that aggregates personal, financial, legal, health, estate and digital estate plans, information and documents in one simple and accessible place. Everplans' professional platform for financial professionals allows them to build stronger relationships with their clients and clients' heirs. For more information, please visit [www.everplans.com](http://www.everplans.com).

## **ABOUT REDTAIL TECHNOLOGY**

Redtail Technology is a leading provider of web-based Client Relationship Management (CRM), paperless office, and email archiving solutions in the financial services industry. Easily affordable, easy to implement and offering integration with many of the industry's most widely used applications, Redtail is committed to providing financial advisors with the core technologies that drive their day-to-day operations. CRM is ultimately about not only acquiring and managing your clients and prospects – it's also about servicing them and, in turn, extracting value from the relationships. At the same time, it's about doing all of these things while simultaneously improving operational efficiency. Visit [www.redtailtechnology.com](http://www.redtailtechnology.com) for more information.

## **SURVEY METHODOLOGY**

<sup>1</sup>Ask Your Target Market (June 2014): The study was conducted with 500 adults aged 18-65+. The sample is nationally representative for age and geographic region, and includes those adults with a household income above \$75,000, which accurately represents the client base of financial services and insurance advisors.

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