



legacy shield™

# Shield

## Protect What's Most Important In Your Life.

Shield provides a consolidated platform to store, organize, and share key information, essentially acting as your life's mission control®.

**Shield consolidates one's entire financial life and administers the sharing of that information when specified: now, later or upon an event like death. The platform consists of our 4 pillars of legacy planning:**

**My Secure Vault:** Provides unlimited storage of all essential documents and can be accessed anytime from anywhere.

**Life Administration:** Records all the accounts, emails, passwords or any account you use in your life.

**My Wishes:** Documents your end-of-life wishes including funeral arrangements, contacts, etc.

**MyLife Stories:** Develop and record your life lessons, precious moments, traditions, family recipes and everything that makes you – you.

### How it works:

*After registration, the subscriber creates a team of a notifier, authenticators, recipients, and advisors.*

**Notifier (1 Person Minimum):** This role alerts LegacyShield of an event (i.e., death, disability, fire, etc.).

**Authenticator (2 Person Minimum):** Records all the accounts, emails, passwords or any account you use in your life.

**Recipients (Unlimited):** These are the people who receive all the tagged information in the system.

**Now, everyone on your team will be offered a complimentary subscription to Shield.**

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**For More Information: (877) 966-2228 | [sbli.legacyshield.com/info](https://sbli.legacyshield.com/info)**



Create an improved customer experience, build closer relationships, and eliminate the customer trust deficit.

The insurance industry is at a critical turning point. Household penetration has never been more of a challenge, and trust and credibility levels need to be restored.

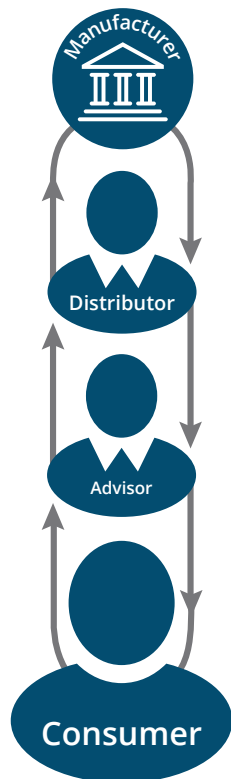
For product manufacturers and distributors, trying to overcome this alone by improving application, underwriting, and product delivery processes is proving both expensive and very time-consuming. And although it may improve the process, leading to easier sales, it's not solving the overarching challenges.

The key is in forming selective partnerships that help the most forward-thinking organizations address their key issues and turn challenges into opportunities.

## Introducing LegacyShield<sup>SM</sup>

A complete legacy and estate planning platform that provides the ability to safely and securely create, store, and share all of your most important information today, tomorrow, and anytime you aren't able.





## Benefits and Solutions

The essential tools provided by the LegacyShield<sup>SM</sup> platform solve several key problems for product manufacturers and distributors of all types and sizes:

- Secure, unlimited storage and sharing of all key documentation in a central vault so that the right people have access to it at the right time
- Broadened cross-communication between consumers, advisors, distributors, and product manufacturers
- Increases consumer trust by making the process consumer-centric, helping the client prepare, organize and store important documents and information
- Improved client experience from end to end – less frustration from customers unable to contact the right advisor or find the right information
- Enhanced credibility as beneficiaries are able to claim what is rightfully theirs
- Allows intermediaries to actively or passively sell enterprise products (e.g., term insurance) or a host of enterprise-selected LegacyShield<sup>SM</sup> products
- Integrate with existing enterprise systems, enabling consumers to purchase directly while engaging on the platform

## How does it work?

The LegacyShield<sup>SM</sup> platform is modular, allowing enterprises to scale to their requirements.

At its core is a secure vault designed to store and share key information at any time with advisors, family, or clients. Share information now for a day, a week, or any other length of time or based on a trigger like death or incapacity.

All key estate, financial, legal, real estate, business, and other documentation is accessed only by user-nominated individuals. On designated dates, or when triggered by user-defined events such as incapacity or death, access is granted to all the necessary information for making claims and receiving the legacy as intended.

In summary...

***Get the right information to the right people at the right time.<sup>SM</sup>***

