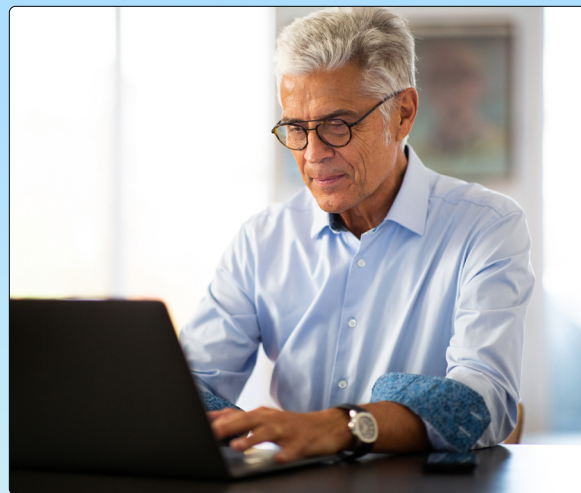


NOTARY CONNECT FOR ESTATE PLANNING

Make every estate plan easier to finish

Bridge the gap between plan creation and completed execution with a managed signing experience built for advisor-led, consumer-led, and hybrid estate planning platforms and service providers.



Don't let the handoff be a service cliff

Once a will, trust, power of attorney, or other documents are ready, clients still need to understand how and where to sign, and coordinate the notarization.

That handoff can become a service cliff, creating more work for the client and for your team: more emails, more vendors, more support questions, and all with less visibility into when the plan was completed. Or worse, whether it was completed at all.

Give clients a clear next step when their documents are ready. Snapdocs coordinates the signing workflow and supports the appropriate mobile or online notarization path for the use case and jurisdiction.

Deliver the model your customers expect

Support the way your business works today:

- ✓ Advisors or staff can initiate a signing for clients they want to help regardless of client location.
- ✓ Consumers can self-serve when that fits the experience, while your business gains end-to-end visibility.
- ✓ Hybrid models can offer both paths without creating two separate operating systems, multiple vendors or overhead.

Protect the experience as volume grows

The right technology and service options reduce the work your team has to own. Scheduling, rescheduling, signing support, document handling, and end-to-end visibility can follow a repeatable, high-quality, fully integrated workflow instead of a collection of manual exceptions.

Better results for financial-services partners

If your business supports financial-services partners, deliver a more complete client experience. Don't hand clients a plan and leave the last mile to chance

Snapdocs helps you **extend your value from plan creation to completed execution**, so you can:

- Give advisors a more complete estate-planning journey to bring to clients.
- Help financial-services firms add execution support without building notary operations.
- Keep your team focused on planning, relationships, and growth rather than dispatching signings.
- Create clearer status and follow-through for the people responsible for client relationships.
- Rely on our credentialed notary network, backed by rigorous credential and insurance verification and consistently high (4.9/5 avg) customer satisfaction scores.

How it Works



The plan is ready

Your platform or firm completes the planning workflow.



The client or advisor starts execution

The right entry point is used for the service model.



Snapdocs coordinates the signing

The appropriate signing path is supported for the workflow.



The experience is managed

Clients receive guidance and support through scheduling and signing.



Your team can follow completion

Status and completed documents move through the agreed workflow.

When applicable, Snapdocs can return the fully executed documents back into your platform.

Built for high-trust, high-stakes workflows

Snapdocs combines purpose-built technology, signing-network access, and hands-on service to help complex, document-heavy transactions move forward with more consistency.



**Ready to make execution a seamless,
positive part of the experience?**

snapdocs.com/estate-planning