

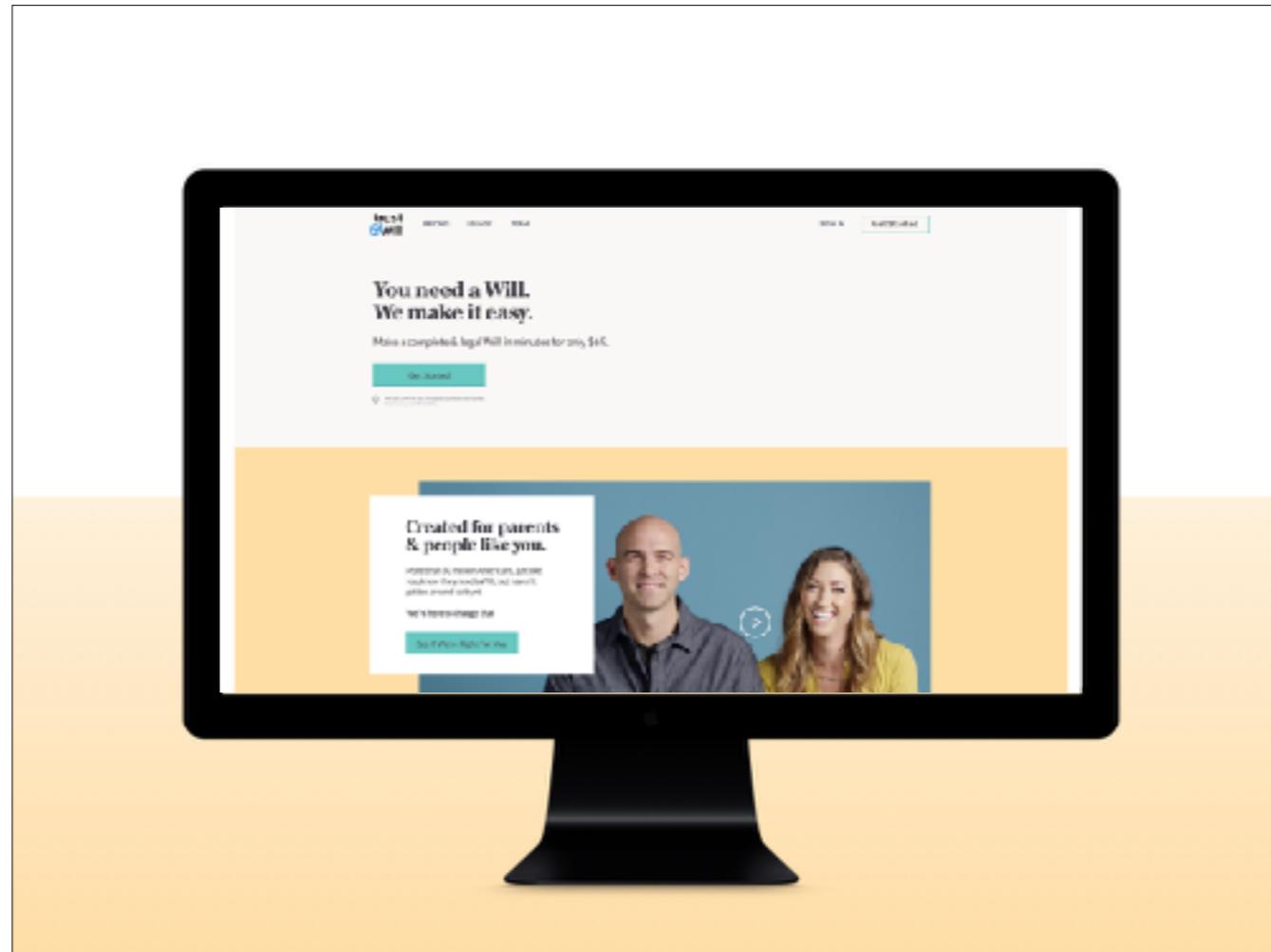
\$170B

Estate Planning Industry



Estate planning is a HUGE \$170B industry that is incredibly fragmented and has been slow in adopting new technology.

To modernize it, we started with the document that every adult knows they need: a Will!



I am excited to introduce you to Trust & Will: the easy, fast, and **secure** way to set up your estate plan online.

[PAUSE]

I'm going to show you what we've built and our vision for the future of this industry

trust & will

SUMMARY MY PEOPLE MY DOCUMENTS PAY NOW GO

My Info

YOU MARITAL STATUS KIDS PETS

Let's get to know each other

My full legal name is
Cody James Barbo

I live in
California

Date of Birth
07 11 1989

U.S. citizen?
Yes **No**

Gender
Man **Woman**

STEP 1 OF 4

Getting the 's and crossing the 's is an important part of creating any valid and lasting legal document. Let's start with providing a little more info about you and your family.

Common questions

What is Full Legal Name?

What if I'm not a US citizen, not a US resident, or my residence is not in the US?

What if I moved recently?

BACK >

Within minutes our users are filling out their information...

trust & will SUMMARY MY PEOPLE MY DOCUMENTS PAY NOW GO ON >

Guardians

KIDS PETS

Who would you like look after James?

I want to choose to be primary guardian

Primary guardian
Mystique Marie McCormick-Barbo

Email
mystiquemarie@gmail.com

A backup guardian will have the same responsibilities as your primary guardian, but will only take effect if your primary guardian is unavailable.

Backup guardian
Daniel Jay Goldstein

Email
daniel@trustandwill.com

← BACK >

0/1000

Most people elect their spouse to be the primary guardian of their pets and children. If you're not married it's common to select a trusted family member or good friend. We suggest appointing 2 backups in case something happens to your primary or backup choice. We collect email to help you easily notify them later and won't send anything without your permission.

Common questions

What is a primary guardian? ▾

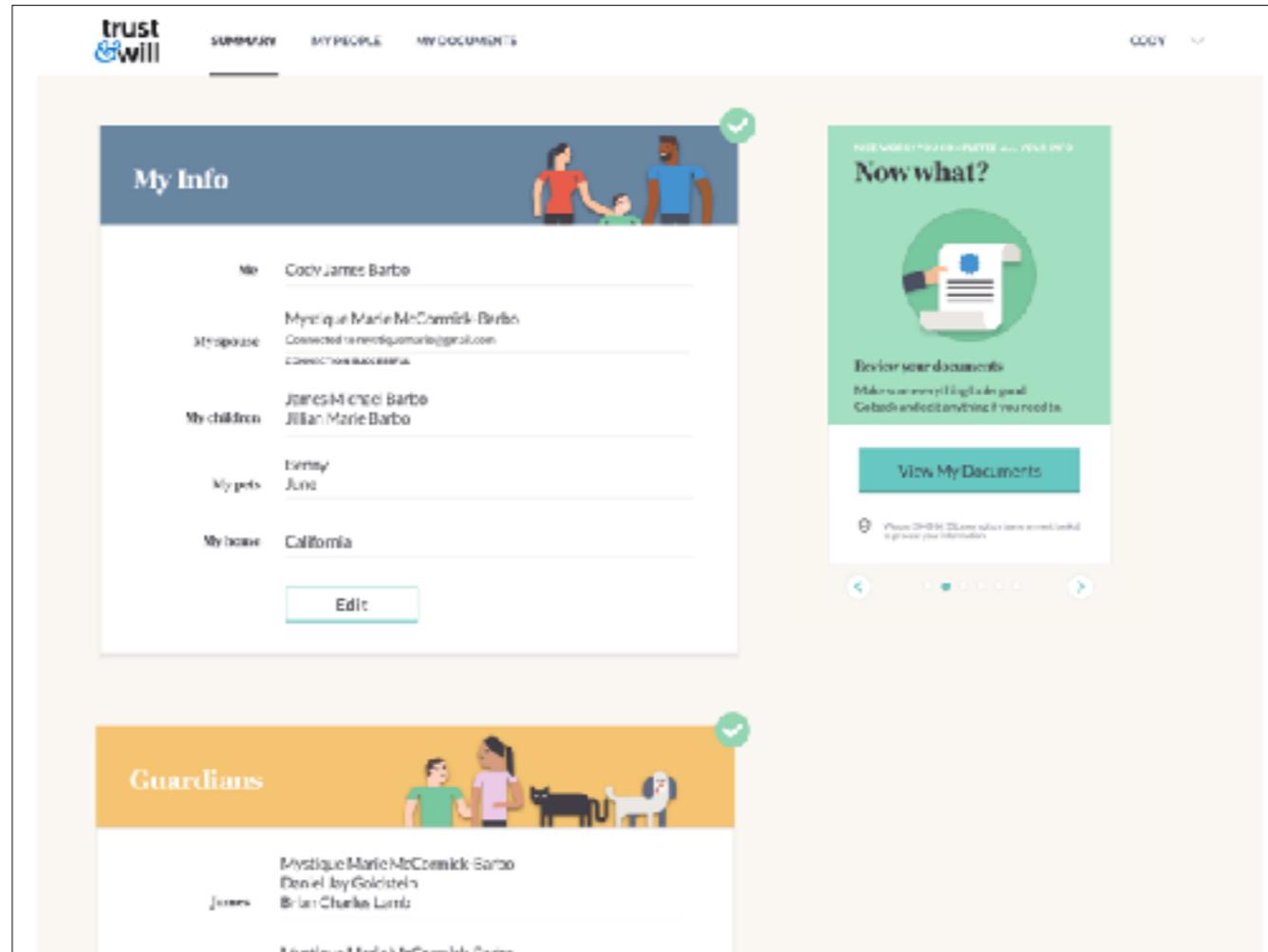
Can someone other than my spouse be a primary guardian? ▾

...and making decisions that matter most to them, like who should look after their kids...

The screenshot shows the 'My Stuff' section of the Trust & Will website. At the top, there are navigation links: 'SUMMARY', 'MY PEOPLE', 'MY DOCUMENTS', 'PAY NOW', and 'GO'. Below this is a blue header with the text 'My Stuff' and an illustration of a desk with a computer and a motorcycle. A secondary navigation bar includes 'FINANCIAL ACCOUNTS', 'DISTRIBUTION', 'CHARITY', 'EXECUTORS', 'GP'S', and 'DIGITAL ACCOUNTS'. The main content area is titled 'Which institutions do you or your spouse currently have financial accounts?' and includes the instruction 'For each institution where you have an account:'. Below this is a grid of 20 financial institution logos, each with a green checkmark in the top right corner, indicating they have been selected. The logos include: Bank of America, Wells Fargo, Chase, Citigroup, Capital One, Ally Bank, Sun Life, PNC, TD Bank, Sun Life, Bank of Montreal, CIBC, Scotia Bank, BMO Bank of Montreal, and Bank of Nova Scotia. Below the grid is a button labeled 'Add Another Financial Account:'. At the bottom left, there is a 'BACK' link, and at the bottom right, there is a large green arrow pointing right. On the right side of the page, there is a progress bar showing '100%' and a paragraph explaining that letting the executor know about accounts will help them locate assets and carry out distributions. Below this is a section titled 'Common questions' with three dropdown menus: 'What if my bank isn't listed here?', 'What if I'm not the primary account holder of an account I have access to?', and 'What about my cryptocurrency?'.

... and who should get their stuff

[PAUSE 1, 2, 3]



And in less than 20 minutes our users have a comprehensive picture of their unique life situation

Personalized, printed, & delivered



We complete the customer journey by shipping a premium on-brand document for our customers to sign, notarize, and store in a safe place

Simple, affordable pricing



\$69

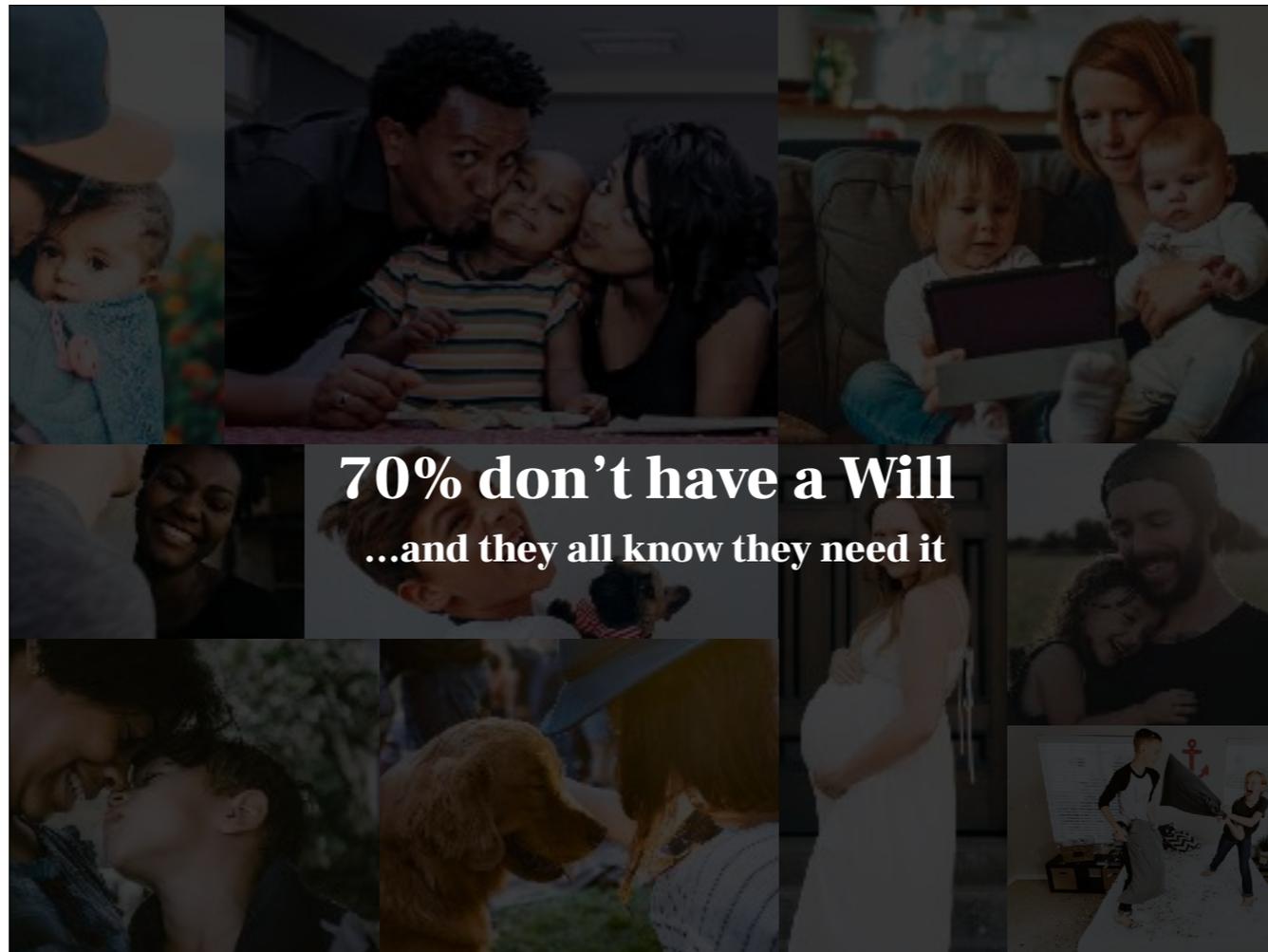
INDIVIDUALS



\$129

COUPLES

Our pricing model is both simple and affordable: \$69 for individuals and \$129 for couples. So, who are we targeting?

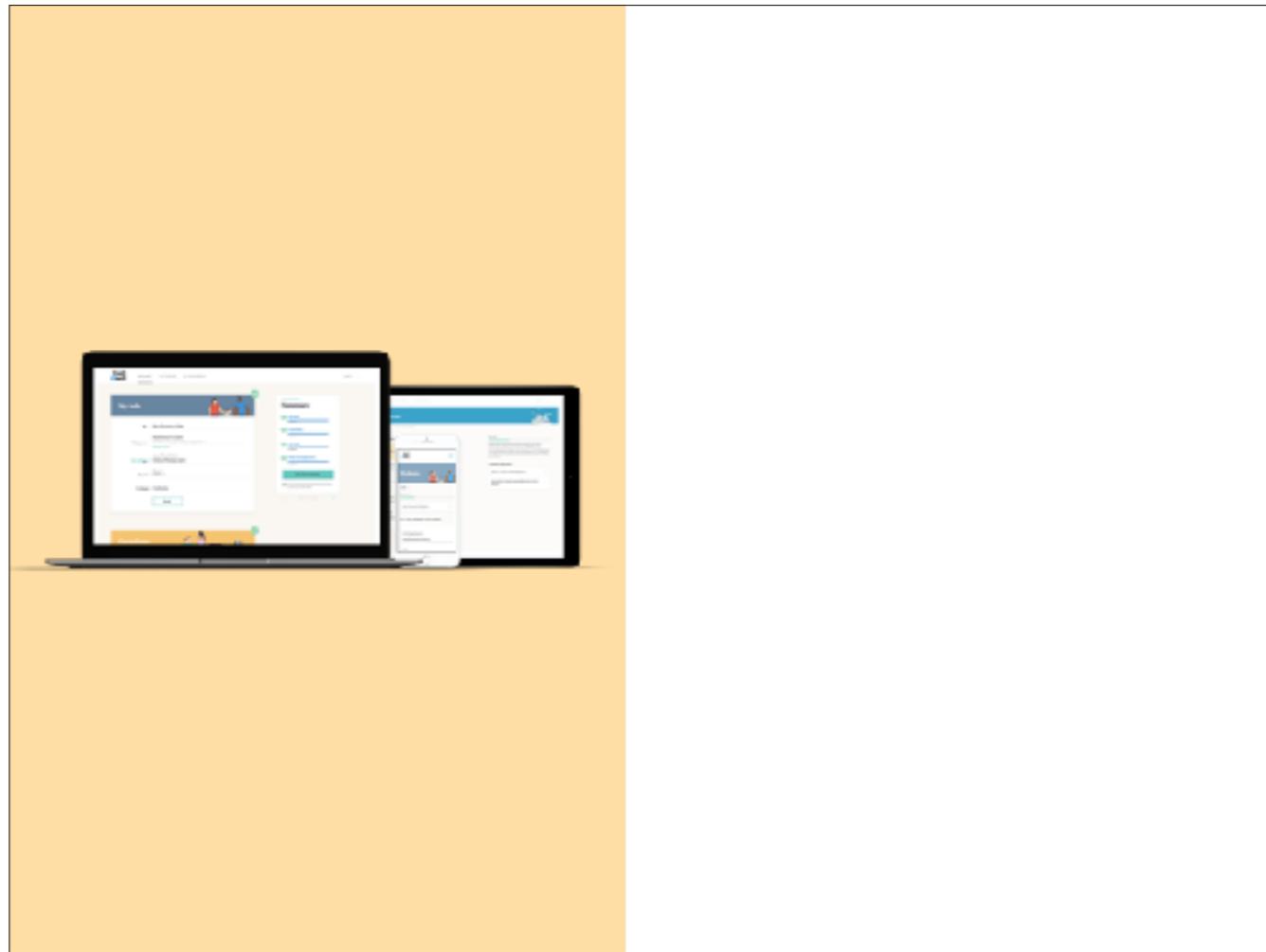


70% don't have a Will
...and they all know they need it

...the 64 million parents in the U.S. with kids under 18.

And the number one inciting incident for writing a Will is having children.

It's crazy to think that 70% of parents with kids under 18 currently do NOT have a Will, yet know that they need one



We have moved at an incredible pace.

We've gone from a closed beta to a live product with paying customers, lined up partnership plans with Fortune 100 companies, and will be available in 47 states – covering 92% of the population

INITIAL PRODUCT OFFERING

Last Will & Testament



We've accomplished all of this with our initial product offering: a 'Last Will & Testament', a document that everyone knows they should have

ESTATE PLAN OFFERING

Trust Services



And we're not just here to talk about Wills! We're here to WIN the \$170B estate planning industry!

Later this year, we'll be rolling out our white glove trust service that 1 in 5 customers have expressed interest in



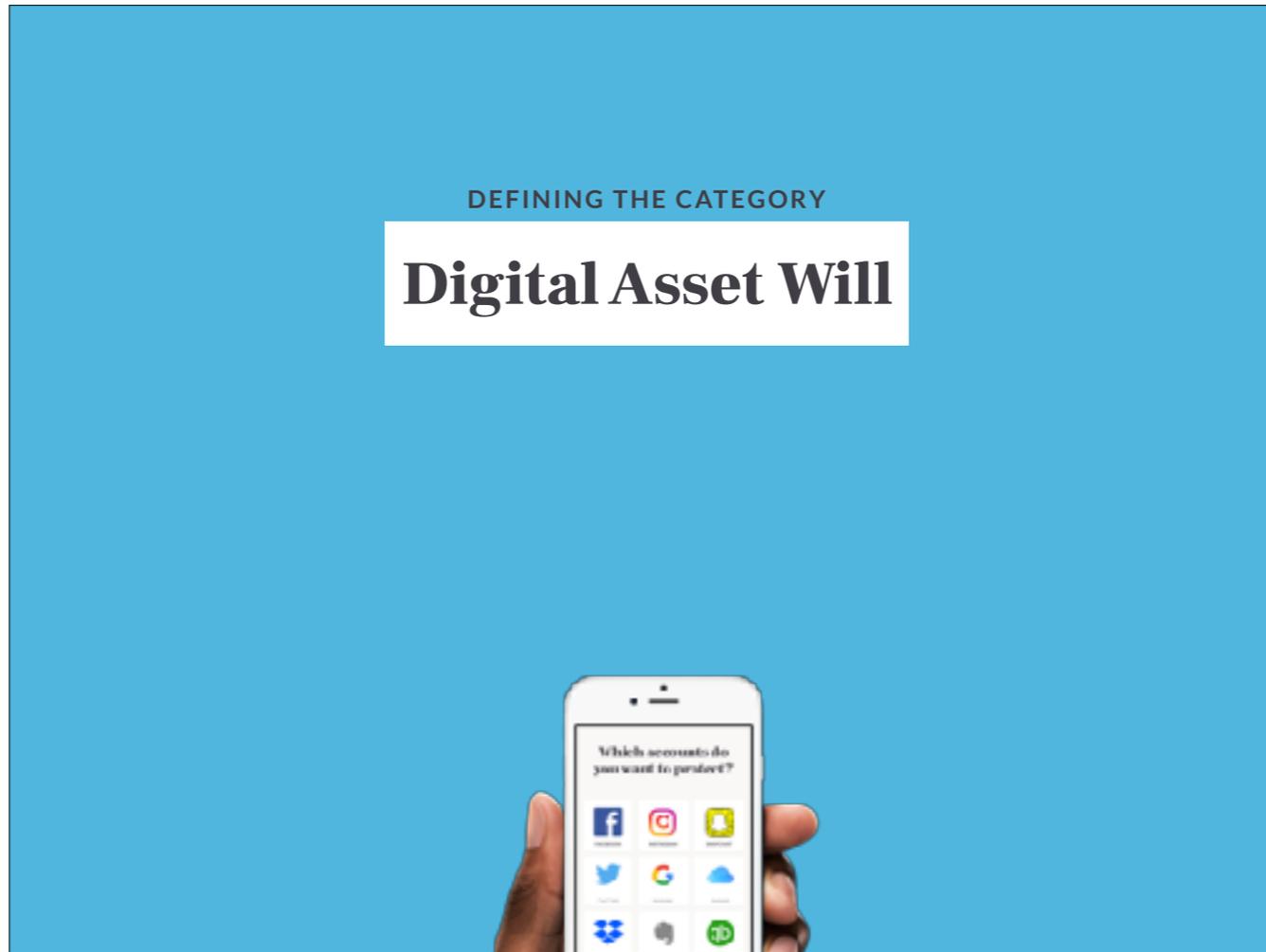
But what about the customers of tomorrow?

What will their asset profile look like when EVERY asset becomes a digital asset?

These are the types of products we're planning for

DEFINING THE CATEGORY

Digital Asset Will



Which is why later this year we are rolling out a first of its kind 'Digital Asset Will' to protect assets like your social media, photos, and cryptocurrency



This is the type of thinking that is positioning Trust & Will to be THE category leader in estate planning.

We'll fit into to a modern, digital life management stack, pioneered by companies like TurboTax and Credit Karma

OUR MISSION

Help everyone leave a lasting legacy



CODY BARBO



DANIEL GOLDSTEIN



BRIAN LAMB



ERIC URHAUSEN



PATRICK HICKS



STEPHEN BERO

So why do we win? Our mature and mission driven team!

I grew my last company from an idea to over a quarter million users.

My co-founders, Daniel and Brian, have spent over a decade in software development working with fortune 500 companies.

To top it off we've been backed by some terrific investors, including Techstars



If you believe the future of this industry is digital, reach out to us!

We want partners who share our vision of helping millions of people leave their legacy.

Thank you!

Is it OK that we don't really know what a will or a trust is?

When I think of a will, it's not really like a good thought I typically think of. I associate it with death.

If I had to describe a trust, I would assume it's ... wow.

The first time I ever heard about a will is probably some 90s sitcom.

I first heard about a will when my parents threatened to leave me out of it when I was a small child.

I don't have a trust. Or a will. I don't have anything. Just me.

We don't have a trust or will because, I don't know, we feel like we're going to live forever.

I've thought about it but I just don't really know how to go about it. At all.

I think I'd associate it with either a high fee or a lot of time, where it felt like a good idea but not something that was a good idea today.