



Jan Financial Planning



## Everything important, in one secure place.

As a client of Jan Financial Planning, you can now access Zenplans – a digital estate planning tool – designed to provide you and your family with priceless peace of mind.

Our lives are made up of so many things, and nowadays almost everything is managed through an online account, which means we need to think differently about how our affairs are organised and managed in our increasingly paperless world. That's why we are offering you access to Zenplans, an easy to use and highly secure tool designed to help you organise all of life's important information in one place, which can be shared with the people that matter most.

### With Zenplans, you can easily organise important information including:



#### Your Assets

- Bank accounts
- Properties
- Items of value
- + much more...



#### Your Debts

- Mortgages
- Credit cards
- Loans
- Leased items



#### Your Daily Life

- Insurance policies
- Utility providers
- Online accounts
- + much more...



#### Your Wishes

- Will
- LPAs
- People to notify
- Lifetime gifts

zenplans

everything important, in one secure place.



# What to expect from Zenplans



## Everything organised

The step-by-step guidance provided by Zenplans makes getting organised easier than ever, meaning your life's important information is all beautifully presented and available at your fingertips to view anytime, anywhere.



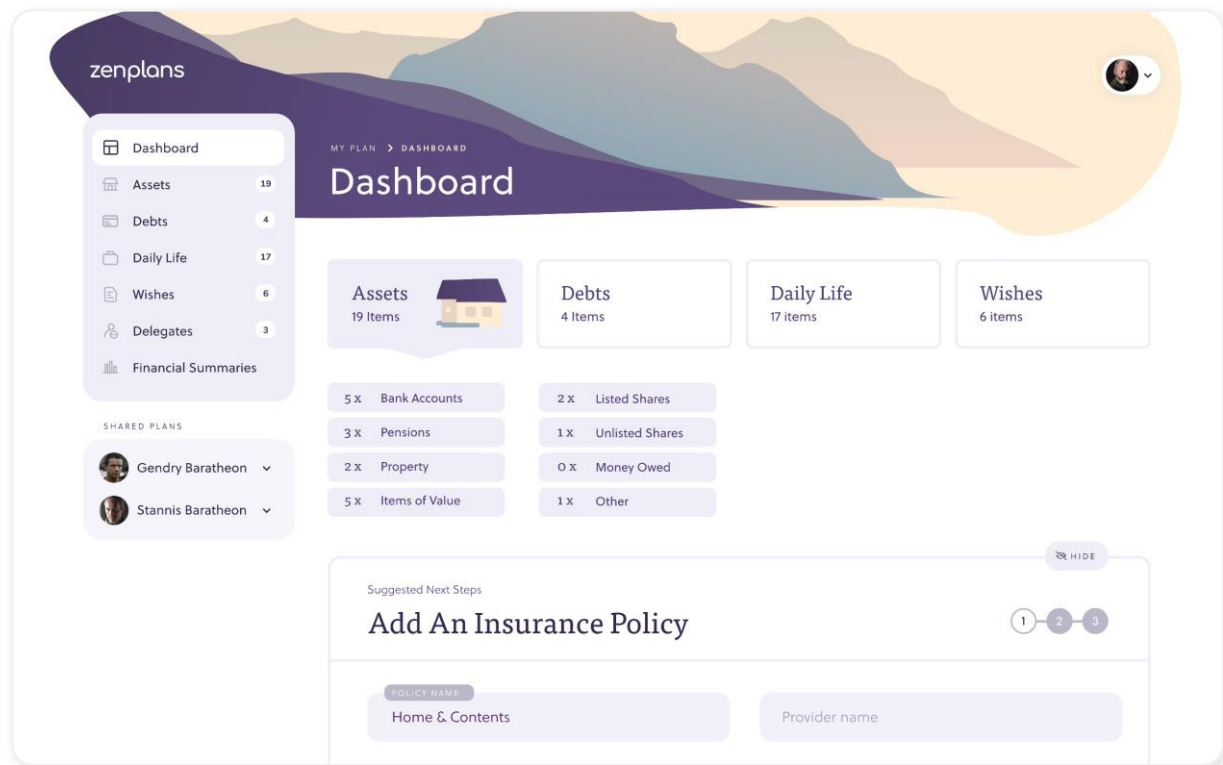
## Everything secure

The data inside your Zenplan is protected with best-in-class security which received the top marks in third party tests. Only you and the people you give access to can view the contents of your plan.



## Everyone cared for

You'll have the option to 'selectively share' your Zenplan with whoever you wish, either in part or in full, today or in the future. This helps ensure that others can easily access everything they'll need should you pass away or lose mental capacity.



zenplans

everything important, in one secure place.