

Trust & Will.

SEI Strategic Partner



Leverage our relationships to get discounted pricing on valuable services.

As part of our continued commitment to help advisors power wealth and focus on client relationships, we have established strategic partnerships with several key business service partners to help you **reduce costs**, **save time** and **increase efficiencies** to run a more successful firm.

Trust & Will

Trust & Will is simplifying estate planning and settlement with attorney-approved, legally valid documents and processes designed to adhere to individual state guidelines. Since 2017, we've helped hundreds of thousands of Trust & Will members leave their legacy with an affordable way to create an estate plan or settle the estate of a loved one. Through the advisor dashboard, financial advisors can easily refer clients and have the ability to track client progress and view their documents.

Contact

advisors@trustandwill.com

Discount

10% off

Website

www.trustandwill.com/advisors/sei

Important information

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