

Goldman
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Ayco Personal
Financial
Management

SurvivorSupport[®]

Financial Counseling Service



We're sensitive to your situation

Ayco's SurvivorSupport® financial counseling service is an employer-provided benefit designed to help you navigate the complex financial issues following the loss of a loved one. Our financial counselors have helped countless clients answer questions such as:

- Where do I begin with all of this paperwork?
- What, if anything, do I do with the will?
- Can I maintain my current standard of living?
- Will my decisions have tax implications?
- Do I need to create a new estate plan?
- Do I need a new life insurance policy? If so, how much and what type?
- How much Social Security am I eligible for, and how long will it be paid?
- Are there other factors I should consider in making decisions about employee benefits?

SurvivorSupport® is designed to coordinate the efforts of your company's human resources team, your attorney, accountant, and insurance agent or broker.

We'll work together to help you as you make financial decisions.

Personal assistance and a plan

By participating in the SurvivorSupport[®] service, you'll receive the following:

One-on-one session

An Ayco counselor will review your financial situation and help you as you resolve issues. Our SurvivorSupport[®] counselors are selected not only for their financial-planning knowledge and experience, but also for their caring and sensitivity.

Personal financial plan

Following your counseling session, you'll receive a detailed letter summarizing the topics discussed and prioritizing issues that require your attention.

Follow-up support

For 12 months after the counseling session, you'll have direct, toll-free access to your Ayco financial counseling team to address issues as they arise, or as additional information becomes available.

Ayco's website

You will also have 12 months of access to Ayco's website. This site allows service participants and the Ayco financial counseling team to collaborate through the secure sharing of documents.



Crucial decisions

Human resource professionals recognize that you're faced with crucial decisions during a time of loss that will impact your financial well-being for years to come. They also know that you may be overwhelmed with advice from well-meaning family and friends or salespeople who may not have your best interest at heart.

Ayco SurvivorSupport[®] counselors understand your company benefits, the financial decisions you may need to make, and how to help as you make those decisions during this time.

Support when you need it most

It's difficult to focus on your finances when you're facing a loss. Unfortunately it's also a time when you may need to make significant financial decisions. We encourage you to take advantage of the assistance being offered to you through Ayco's SurvivorSupport[®] financial counseling service.



Providing answers

The SurvivorSupport® financial counseling service is a company-provided benefit. Counselors are knowledgeable and compassionate. We're here to help you through the difficult decisions you need to make during this time.

Take the first step. Call us today at 800-235-3417.

The SurvivorSupport® service can provide invaluable guidance to you and your family during this difficult time.

The sooner you call, the sooner we can be of assistance.

About Ayco

Ayco is a national leader in company sponsored financial counseling. We provide innovative financial planning with a holistic, personalized approach that is at the heart of our 50-year history. We believe in the power of human relationships to drive action and we are more than just advisors. We're partners.

To learn more visit ayco.com.

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Revised: April 2021 | 3677-SS Trifold 12 months