

# FIN Compliance partners with Estate Planning tech firm Life Snapshot

*FIN Compliance's collaboration with estate planning tech provider aligns with its goals towards support the investment firms in its network.*

WALNUT CREEK, CA, UNITED STATES, April 14, 2021 /EINPresswire.com/ -- FIN Compliance partners with Life Snapshot to provide [estate planning](#) and continuity resources to its network of professionals and their clients.



For nearly a decade, with its roots in [RIA Compliance](#), the company works with boutique firms comprised of investment advisors, insurance agents, registered representatives, and other types of professionals who make up the securities industry.

“

Our collaboration with Life Snapshot and its Founder Cheri Williams-Franklin helps us to address both estate planning and business continuity provisions for supporting our clients”

*Cory Roberson*

FIN Compliance is committed to supporting its clients (and their clients) with compliance, continuity measures, and the introduction of Life Snapshot for estate planning purposes.

“Our collaboration with Life Snapshot and its Founder Cheri Williams-Franklin helps us to address both estate planning and business continuity provisions for supporting our clients” - Cory Roberson.

A lack of estate planning leads to an even bigger problem of unclaimed assets in the United States. In 2020, according to the National Association of Unclaimed Property Administrators, there is an estimated \$100 billion in unclaimed assets (up from \$40 billion in 2015) held by government agencies because of a lack of beneficiaries to claim such property.

Obtaining life insurance can be a part of the solution to this growing issue, but there is a

caveat—unrecoverable insurance policies. From the above total, there is estimated \$7.4 billion in unclaimed insurance policies.

Losing a loved one or caring for an incapacitated relative can be even more stressful when faced with the challenge of sorting their financial affairs. Life Snapshot is a solution to support family members in such unexpected events.

Life Snapshot addresses this need by helping families put their financial affairs in order. It's digital storage vault consolidates personal assets and final wishes information into a custom report that is safeguarded and can be easily shared among families when dealing with hospitalization, hospice, or end-of-life.


Life Snapshot has a team of support specialists to partner with its members to ensure the delivery of a custom report along with relevant estate planning documents, such as an advance directive, power-of-attorney, insurance policies, wills, succession plans, and more.

Life Snapshot Founder, Cheri-Williams birthed this vision as a result of tragic circumstances when her sister died unexpectedly at the age of 36, sending the family into a period of shock.


“My mother and I had to go to her home just two days after she died to look for documents being requested by the funeral home. She mentioned to me in passing that she had purchased life insurance, but we were never able to locate it. Life Snapshot is the platform that I wish my sister had utilized prior to her death, it's a simple roadmap for families,” says Cheri.

More about Life Snapshot - <https://youtu.be/MwMmG92Zb5U>

Compliance services for the digitized age



RIA Compliance Solutions



Estate Planning Tech

FIN Compliance addresses a growing number of complexities with small firms. It provides compliance, consulting, and business management solutions to assist the investment industry in achieve its compliance and business goals.

To support its endeavors, FIN Compliance works with an affiliate group of professionals, mostly consultants and other tech vendors, with expertise in fields such as crowdfunding, estate planning, automations, tech support, accounting, marketing, etc.

For more information, please visit <https://FINCompliance.io>.

Cory Roberson  
FIN Compliance  
+1 650-305-2688

[email us here](#)

Visit us on social media:

[Facebook](#)

[Twitter](#)

[LinkedIn](#)

---

This press release can be viewed online at: <https://www.einpresswire.com/article/538554786>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2021 IPD Group, Inc. All Right Reserved.