

Sureify Partners With FreeWill To Broaden Access To Estate Planning Products For Clients Of Top Life Insurance Carriers

Strategic partnership enables leading life insurance companies to offer a seamless solution for individuals and families to create end-of-life plans

SAN JOSÉ, CA, UNITED STATES, August 17, 2023 /EINPresswire.com/ -- Insurtech leader [Sureify](#) and estate planning platform [FreeWill](#) have announced a strategic partnership that will help more of America's top Insurers provide estate planning benefits to their clients and prospects. This partnership will enable FreeWill's estate planning solutions to be integrated with life insurance tools that together offer a seamless way for individuals and families alike to create their end-of-life plans.



Sureify Announces Strategic Partnership With FreeWill to Broaden Access To Estate Planning Products

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Jenny Xia Spradling

FreeWill helps more than 200,000 Americans write wills and revocable living trusts each year, more than any other digital estate planning tool. By partnering with Sureify, FreeWill's easy-to-use estate planning solutions can be distributed and implemented easily across the respective footprints of several of America's largest life insurance providers. This will allow FreeWill to scale its enterprise platform, which includes building embedded, custom sites that offer convenience to end-consumers while offering advanced insights and analytics tools to clients.

Sureify's cutting-edge technology and [LifetimeENGAGE](#) product have already transformed the life insurance experience for many carriers, enabling them to connect with customers in new and meaningful ways. By partnering with FreeWill, its customers will be better equipped to

provide estate planning resources, a critical element of financial planning that is all too often neglected because of perceived cost and complexity.

"FreeWill is a well-known, highly regarded estate planning platform, and this partnership will provide a truly integrated solution that addresses the interconnected needs of life insurance and estate planning," said Dustin Yoder, Sureify Founder & CEO. "We foresee this partnership as a way to empower individuals and families to protect their loved ones financially, and we believe carriers are eager to offer this benefit to their customers.

"We are thrilled to partner with Sureify as we continue to scale our enterprise offering to a variety of financial institutions, including life insurers," added Jenny Xia Spradling, co-CEO of FreeWill. "Estate planning is one of the most important elements of financial planning, yet at the same time, just 30% of Americans have a will. There's definitely an access problem. By aligning with Sureify – a digital partner to many life insurers – we're confident that we can help more carriers deliver solutions while driving brand loyalty and solving a continued societal challenge."

The integration of FreeWill's estate planning capabilities within Sureify's digital product suite is expected to fuel additional growth for both companies and for the life insurers with whom they work. The partnership will ultimately empower individuals to make informed decisions about their financial and estate planning needs quickly and easily.

About Sureify

At Sureify, we are transforming the life insurance and annuity industry with our cutting-edge suite of products. Our Lifetime suite empowers carriers to thrive in the ever-changing technology landscape. Sureify's comprehensive suite of solutions (LifetimeACQUIRE, LifetimeAGENT, LifetimeENGAGE, LifetimeSERVICE, and CoreCONNECT) seamlessly facilitates connections between carriers and their agents and consumers, providing digital experiences that not only exceed expectations but also redefine how policyholders are acquired, serviced, and engaged throughout the entire lifetime of a policy. We are dedicated to continuously pushing the boundaries of innovative thinking, approaches, and solutions that enable carriers to stay ahead of the competition and deliver unparalleled agent and customer experiences. Learn more at www.sureify.com.

About FreeWill

FreeWill is a social-good enterprise offering online tools that empower Americans to address commonly faced estate planning needs and make charitable donations in tax-advantaged ways, all for free. Through its partnerships with 1,000+ nonprofits who understand that major gifts often are part of estate plans, the company is also able to provide a comprehensive suite of estate planning and related tools to consumers free of cost. To date, FreeWill has generated more than \$8 billion in planned and real-time gifts for more than 10,000 nonprofits while helping more than 800,000 consumers create wills and plan their estates. Companies interested in inquiring regarding potential enterprise partnerships can learn more here:

<https://lp.freewill.com/enterprise>

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