

# BluPeak Credit Union Unveils Estate Planning Digital-First Strategy in Collaboration with Trust & Will

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[/EINPresswire.com/](#) -- [BluPeak Credit Union](#) is proud to announce a strategic collaboration with [Trust & Will](#), marking a significant step towards bolstering their digital services for their expansive membership base. Under the newly launched digital-first initiative, BluPeak Credit Union aims to provide seamless and efficient [estate planning](#) options, emphasizing accessibility, affordability, and member-focused financial planning.

With a strong commitment to the financial well-being of its members, BluPeak has aligned with Trust & Will, a renowned leader in digital estate planning services, to extend a comprehensive suite of tools that enable members to manage their estate planning needs conveniently. This innovative partnership will

empower over 55,000 BluPeak Credit Union members to access user-friendly estate planning digital tools 24/7 with a preferred pricing of 20% discount off of the already affordable pricing model, streamlining the estate planning process and ensuring their financial security for the future.

Vito Zerilli, the VP Member and Deposits at BluPeak Credit Union, expressed his enthusiasm about the collaboration, stating, "BluPeak's estate planning digital-first strategy, in partnership with Trust and Will, is a significant step forward in our commitment to serving our members' evolving financial needs. We are dedicated to providing accessible and affordable digital



BluPeak Credit Union Logo



Trust and Will Logo

solutions that empower our members to secure their financial future seamlessly."

"We're thrilled to partner with BluPeak Credit Union, which shares our San Diego roots, to help their members with affordable, comprehensive estate planning services," said Cody Barbo, Founder and CEO of Trust & Will. "We look forward to helping even more families create a legacy through this new partnership."

The partnership between BluPeak Credit Union and Trust & Will underscores a shared vision of prioritizing members' financial well-being, empowering them to proactively plan for their financial future. This strategic collaboration represents a significant milestone in BluPeak's ongoing commitment to delivering accessible and member-focused financial services.

For media inquiries and further information, please contact:

BluPeak Credit Union: 10120 Pacific Heights Blvd Ste 100, San Diego, CA 92121

Insured by NCUA

Vito Zerilli

BluPeak CU

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