

# Vanilla Customer Marketing Kit

- ① Client-Facing Assets
- ② Social Posts
- ③ Emails

# ① Client-Facing Assets

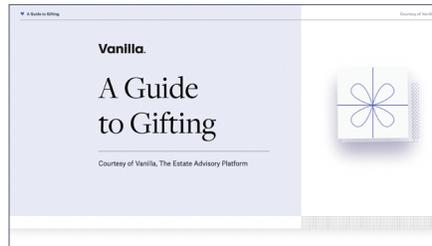
The following assets can be used in client presentations, or to engage with clients or prospects over email to encourage them to book a meeting. Many of these reports are also available in the Vanilla application as part of the Report Builder.



BRANDABLE PPT

## Why Estate Planning Matters

Win new clients with this brandable PowerPoint presentation for client meetings. It can help them understand why estate planning matters and how you can make the process as simple as possible by using Vanilla.



BRANDABLE PPT

## A Guide to Gifting

Walk clients through the major types of charitable and non-charitable gifts they may want to consider.



BRANDABLE PPT

## A Guide to Advanced Estate Planning Strategies

This brandable presentation illustrates the most common estate-tax mitigation strategies with helpful diagrams.



PDF

## Estate Planning Doc Checklist

Ensure your clients arrive to your estate planning meeting prepared, with this document checklist.



PDF

## Why Vanilla Overview

This PDF outlines why estate planning is important, and why working with your firm and using Vanilla makes the process (and product) better.

## ② Social Posts

These social posts have been written for LinkedIn or Facebook, but can be shortened to include on Twitter/X or other social platforms as well. You can also use these as part of your client newsletters.



SOCIAL POST #1

### Announcing Vanilla

*Here's a post to announce to customers (and prospective customers) that you've enhanced your estate planning capabilities with Vanilla..*

Every family needs a well-crafted estate plan, regardless of your asset level. That's why we are thrilled to introduce Vanilla to our clients.

With Vanilla, we marry your financial plan with your estate plan and visualize it with helpful graphics that make sense of the complexities. We can also model new strategies that will help mitigate taxes, with up to 40% savings. Vanilla even enables creation of estate documents like trusts and powers of attorney using technology. Reach out for more info!



SOCIAL POST #2

### Why Estate Planning Matters

*This post offers your customers and prospects more information about the importance of estate planning, and what can go wrong when their plan isn't up to date.*

Curious about estate planning? Check out our guide that walks you through important considerations. Then schedule an appointment and we can discuss your needs.

[Why Estate Planning Matters \(Brandable PPT\)](#)



SOCIAL POST #3

### Gifting

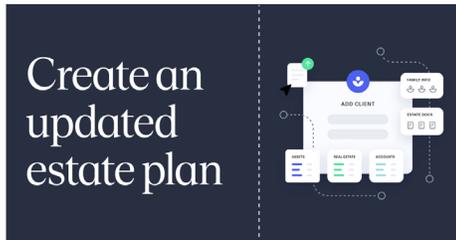
*Gifting is an important tax strategy. This post offers a guide to gifting for your customers and prospects– perfect towards year-end (or really, anytime!).*

Giving to causes you care about can be a great way to not only support those important causes and also alleviate your tax burden. But there are many different types of giving with different tax implications. Check out this guide to learn more. Then reach out and we can discuss your specific goals!

[Guide to Gifting \(Brandable PPT\)](#)

## ② Social Posts

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SOCIAL POST #4

### New Core Docs

*This post is a reminder that details matter in estate planning, and it's important to stay current.*

So often, when we look at estate plans, they have outdated information that doesn't reflect clients' current needs. Are your kids adequately cared for—and are their guardians still correct? Have you moved since your will or trust was created? These details matter a lot. Drop us a line and we can talk about your estate plan, and if needed you can easily create new docs through Vanilla Document Builder.



SOCIAL POST #5

### Adult Kids, Power of Attorney

You have an updated Power of Attorney, right? Without it, no one can make decisions about your important healthcare or financial matters if you're incapacitated. What about your adult children? Do you have a POA for them? If you don't, and they are above the age of 18, you won't have access to healthcare info or be able to influence care if they are hurt. Reach out, and we can easily set you up with POAs and more.

## ③ Emails

The following emails can be sent by themselves or incorporated into your firm's newsletters.

REMIND CLIENTS TO REVIEW  
THEIR ESTATE PLANS

### A Better Way to Do Estate Planning

Dear [Client],

When was the last time you reviewed your estate plan? It's one of the most important pieces of your holistic financial plan, but most people don't review it frequently enough and often have plans that don't meet their current needs.

At [Firm Name], we use Vanilla to help you ensure you have a plan that works with your needs. Schedule a meeting today, and we can visualize your current plan and strategize on how to improve it.

Ready to review your estate plan—or create a new one? Let's schedule an appointment. Just send an email to [firm or advisor email] and we'll get something on the books.

Sincerely,

[Advisor]  
[Firm]

IF YOU CHARGE  
FOR VANILLA DOCS

### New Documents with Vanilla

Dear [Client],

In the past, creating a new estate plan was an arduous and expensive process. And often those plans were completely divorced from your financial plan. The good news is we are now working with the software company Vanilla, and you can create new trusts, powers of attorney, and healthcare directives that are state-specific with ease using Vanilla Document Builder. And at a much lower cost than traditional estate planning.

Reach out to us at [Firm Email] to discuss estate planning and get started creating estate documents with Vanilla Document Builder.

Sincerely,

[Advisor]  
[Firm]

IF YOU DO NOT CHARGE  
FOR VANILLA DOCS

### New Documents with Vanilla

Dear [Client],

In the past, creating a new estate plan was an arduous and expensive process. And often those plans were completely divorced from your financial plan. The good news is we are now working with the software company Vanilla, and you can create new trusts, powers of attorney, and healthcare directives that are state-specific with ease using Vanilla Document Builder.

Creating these estate documents with Vanilla Document Builder can be done for no additional fee. We include it as a part of doing business with us, because we want to ensure you and your family are protected.

Reach out to us at [Firm Email] to discuss estate planning and get started creating a new plan with Vanilla.

Sincerely,

[Advisor]  
[Firm]