Script: Widows V.2

Target Audience: Prospects, Clients, COIs
Estimated Total Runtime: 2:30
Strategy: Post on website landing page, social media, send in email

[Eric]
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Losing your spouse brings on a mix of emotions – not only are you missing your partner, but you're now faced with navigating life alone – something many people aren't prepared for.

This could be the first time you're figuring out how to pay the electric bill or logging into your retirement account.

I had the opportunity to work with a really great couple years ago here in the Bay area. They were fairly new clients and had recently transferred all of their financial assets over to me. The husband passed away unexpectedly just six months after he retired. His wife came to me and said she had no idea where to turn. She didn't even know how much money they had or where it all was. All of their important documents were on his computer – the bank accounts, investment accounts, and more – but she didn't know the password.

So, I helped her locate a computer expert to finally gain access. Then I set her up with a CPA, an estate attorney, and within six months she was on top of everything.

It felt good to guide her from a place of anxiety and fear to feeling secure and confident in her future. She was very grateful for the help.

She was one of the first widows I ever worked with. All these years later, it still sticks with me. Helping widows is deeply personal to me.

In fact, I watched my own mother experience the shock of a sudden loss when I was about 10 years old. I saw firsthand how devastated she was and she had NO ONE to guide her or offer any assistance.

So it's kind of an added bonus with each widow I help, it feels like I'm saying, "Hey mom, I couldn't help you. But look, I helped someone else." It's my way of paying homage to her.

So, if you've experienced a similar loss, please give Apex a call. It's ok to ask for help – and it's guidance and assistance we're more than happy to offer you.

In fact, I recently put together a guide for someone who just lost a spouse called "When A Loved One Passes Away."

The purpose of this complimentary guide is to help a surviving spouse minimize the fear of the unknown and the anxiety that may lie ahead. It provides a path and process to help you set priorities and make more informed decisions.

Call me at (925) 516-2732 or e-mail me at eric.soiland@wfafinet.com to request your free guide.

Remember, your life path is a series of transitions – let APEX be your guide. We can help get you to your destination.

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