

What should I do with insurance proceeds?

How will I meet my expenses?

What are the tax implications of receiving insurance proceeds?

Who can answer my financial questions after the passing of a loved one?

Beneficiary Financial Counseling from PricewaterhouseCoopers LLP

What is Beneficiary Financial Counseling?

Independent financial counseling resources provided by PricewaterhouseCoopers LLP (PwC) are designed to help beneficiaries make sound financial decisions at a difficult time.

Who is PwC?

PwC is a professional services firm with decades of experience in personal financial education and counseling. PwC provides objective, independent financial counseling with absolutely no product sales.

Who can access these services?

All beneficiaries receiving proceeds of \$25,000 or more. Beneficiaries must opt in to the service and there are no product sales involved.

Is this service automatically provided?

Beneficiaries must opt in to the service. Information will only be shared with PwC after an authorization is signed by the beneficiary. The level of service available depends on the amount of proceeds received.

How will my beneficiary learn of this service?

Beneficiaries will receive materials explaining the program with the insurance benefit check. The package will outline the options available for the beneficiary and provide contact information for PwC.

What resources are available?

- Beneficiary reference guide
- Access to a financial counseling website for 12 months
- Financial Fitness assessment
- Step-by-step assistance in completing a personalized financial plan
- Bi-monthly newsletter

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