Everence will preparation benefit

Purpose: Offers members partial financial reimbursement of the costs of preparing a legal will or other end-of-life/legacy planning.

Who is eligible

People who own or are using an Everence® product or service and are members of Everence Association.

Amount of grant

50% of the cost, up to $50 per household every five years.

Eligible expenses

The cost of the preparation of a legal will and other attorney services pertaining to end-of-life/legacy planning.

How to apply

- Get an application from your Everence representative or from everence.com.
  Enter **Will Preparation Benefit Grant** in the search box.
- The application must be signed by an Everence representative.
- Copies of your lawyer's bill must be included with the application.
- You must apply within 12 months of preparing a will.

After processing, the reimbursement check from Everence will be mailed directly to the grant recipient.

Everence Will Preparation and Legacy Planning Benefit application

Everence®

For office use only

Grant #_____

Member _____

Name of person requesting reimbursement _____

Street _____

City _____ State _____ ZIP_____

Telephone _____

I am an Everence member and am using the following product or service (include contract or agreement number on the line following the product or service):

☐ Everence health plan _____

☐ Everence annuities _____

☐ Mennonite Retirement Trust _____

☐ Praxis Mutual Funds _____

☐ Everence Foundation/Charitable Services _____

☐ Life insurance _____

☐ Long-term care _____

☐ Everence Federal Credit Union account _____

☐ Disability insurance_____

☐ Everence Trust Company_____

☐ Everence Asset Management_____

☐ Comprehensive Financial Planning_____

☐ Equities _____

Name of Everence representative (*please print*):_____

Signature of Everence representative: _____ Date: _____

Return to: Sharing Fund, Everence, P.O. Box 483, Goshen, IN 46527. Fax: (574) 537-6639. Email: sharingfund@everence.com

The information on this application assists us in correctly identifying recipients within the Everence database. This information is confidential and will not be sold or distributed to anyone outside of Everence.

Everence
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P.O. Box 483
Goshen, IN 46527
everence.com

Toll-free: 800-348-7468
T: 574-533-9511