

# Everence will preparation benefit

**Purpose:** Offers members partial financial reimbursement of the costs of preparing a legal will or updating an existing will.

## Who is eligible

People who own or are using an Everence® product or service at the time of preparing a will and are members of Everence Association.

## Amount of grant

50 percent of the cost of preparing a will, up to \$50 per household every five years.

## Eligible expenses

The cost of the preparation of a legal will.

## 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**®

# Everence Will Preparation Benefit application



<b>For office use only</b> Grant # _____ Member _____
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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 \_\_\_\_\_
- Mennonite Foundation\*/Charitable Services \_\_\_\_\_
- Life insurance \_\_\_\_\_
- Long-term care \_\_\_\_\_
- Everence Federal Credit Union account \_\_\_\_\_
- Disability insurance \_\_\_\_\_
- Everence Trust Company \_\_\_\_\_
- Everence Asset Management \_\_\_\_\_
- Comprehensive Financial Planning \_\_\_\_\_

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

**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.**

\*Mennonite Foundation is an affiliate of Everence.

<b>Everence</b> 1110 N. Main St. P.O. Box 483 Goshen, IN 46527 everence.com	Toll-free: (800) 348-7468 T: (574) 533-9511
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