My Life & Wishes announces strategic partnership with Sweet Financial Services

Scottsdale couple on a mission to integrate end-of-life planning tools into financial advisors' practice

SCOTTSDALE, AZ (June 1, 2020) – Financial advisors have seen an uptick in calls during the pandemic crisis as clients seek ways to safeguard their financial assets. Unprecedented global uncertainty has also given rise to new collaborations between financial services firms and end-of-life digital planning platforms, as financial advisors see a need for new levels of customer care that goes beyond balancing the portfolio.

Today, Scottsdale-based My Life & Wishes, an end-of-life planning and digital document storage platform, announced a partnership with Sweet Financial Services, one of the largest independent financial advisor practices in the Southern Minnesota and Northern Iowa region. The new partnership will give clients of Sweet Financial Services access to the full suite of My Life & Wishes digital tools and services as part of the financial advisory group's ongoing mission to provide unsurpassed client service and care.

Started by former financial advisors who were caught off-guard when a family member unexpectedly died without an end-of-life plan or roadmap to their essential information, the My Life & Wishes online hub guides users on what their families will need in the event of an emergency or death -- including access to financial assets, insurance policies, estate plans, wills and other legal documents, funeral wishes, ID numbers, online account log-ins and passwords, even the location of safe deposit box keys – and gives them a convenient, safe digital place to store it all, where it can be updated and accessed by authorized users when needed.

“At a time when we are all too aware of what happens when disaster strikes, it’s comforting for our clients to know they are prepared,” said Bryan J. Sweet, founder of Sweet Financial Services. “We chose to partner with My Life & Wishes because the platform makes getting organized in the digital age easy and secure. Sweet Financial advisors have an unprecedented opportunity to build stronger, more enduring client relationships by integrating smart end-of life planning tools into our practice, for a life well planned.”

“We are pleased to partner with Sweet Financial Services to empower its financial advisors with game-changing tools they can pass on to their clients,” said Jon Braddock, co-founder of My Life & Wishes. “Making the leap to integrating end-of-life planning tools into their practices is a no-brainer. By building this crucial step into an advisor’s daily workflow, trusted financial advisors can inspire clients to tackle the uncomfortable topic of death, and plan accordingly, before something happens. Taking the next step to securely store their important financial and personal information in one convenient place, with the ability to access it 24/7, is an essential part of the ever-evolving financial advisor-client relationship.”

About My Life & Wishes
My Life & Wishes is a new website and online planning tool that simplifies a wide range of end-of-life planning considerations, including healthcare directives, funeral direction as well as last wish instructions, wills, insurance papers, banking and investment portfolio information, and all critical information needed to sort out estate settlements. The online step-by-step end-of-life planning guide, education hub and document storage site was created by long time retirement planning consultants and financial advisors, Jon and Michelle Braddock, after Michelle's 88-year-old father unexpectedly died leaving no end-of-life plan behind for his family. It took the family nearly a year to untangle his finances, find and access online accounts without a list of passwords, trace safety deposit box keys, bank accounts, life insurance policies, and more. Learn more about Jon and Michelle’s story at https://vimeo.com/152296272.

About Sweet Financial Services
The Sweet Financial Services team believes that every person has the right to create their own dreams. As developers of The Dream Architect™, a strategic 4-step planning process that helps prioritize what is truly important to a client’s future, as well as a blueprint to take action, Sweet Financial advisors start with a simple question: What does your dream retirement look like? The firm’s innovative approach to wealth management has earned Founder and CEO, Bryan Sweet, recognition in such top publications as the Forbes Best-in-State Wealth Advisors and Inc Magazine Top 5000 fastest growing Private Companies. At Sweet Financial, the goal isn’t just to help manage client investments – it’s to inspire clients to pursue their version of the perfect retirement, because to Sweet Financial’s family of advisors, clients are the sole architects of their dreams.

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