



Planning for the Unexpected During COVID-19 and Social Distancing with [CheckoutPlan.com](https://www.checkoutplan.com)

Personal Advisors Support their Clients in Troubled Times

July 16, 2020, KELOWNA, B.C. – [Check-Out Planning Services Ltd.](https://www.checkoutplan.com) is celebrating the launch of [Check-Out for Business](https://www.checkoutplan.com).

Check-Out is a web-based service that prompts people to gather and organize all the important aspects of their life into one central location. The platform is helping families gain a sense of control during COVID-19 and these uncertain times.

Gathering household and financial information and making it accessible from anywhere is the kind of insurance families can no longer live without. Should information be needed in the event of an emergency, the system allows team members (typically family or personal advisors) to access the information. This is a valuable feature for people suffering cognitive disorders or, who are challenged with living alone.

CheckOutPlan.com is designed to encourage friends, family and professionals to be involved in the building of the person's Life plan or Legacy Plan. This built-in system of community encourages contact with a constructive purpose, creating a sense of empowerment and a bit of virtual relief from the effects of social distancing.

The demand for the new Check-Out for Business workflows have come from the industry itself, as Adrian H. Walton, co-founder of Toronto's Resolved Estate Services confirms, "In our case, we meet executors when they realize just how many details are involved in settling an estate. We recommend CheckOutPlan to help our clients avoid this mess entirely by having all the information they need in one easily accessible location."

A user, or people authorized by the user, can login securely from anywhere in the world and access important data that may be needed in the event of an emergency. Journals, documents, legacy plans, and an inventory of life's assets are all available through Check-Out. Today's world is more complicated than ever with social media accounts, multiple online services, app subscriptions, blended families and multiple pets now becoming the norm. Most people do not account for these factors or consider where their personal or business affects will end up.

The Check-Out for Business workflows save money and time for professional and personal Advisors such as financial planners, estate planners, and lawyers as they work with their

clients to gather the information essential to the completion of files. Using Check-Out prompts the Client to provide the correct documents and improve efficiency for the Advisor. And, for the Client, having one central location to keep and share important documents provides peace of mind both for them and their families.

The platform also helps the Advisor create intergenerational relationships and improves customer retention and loyalty. Affordable packages are now available at:

CheckOutPlan.com/Business/.

About Check-Out Planning Services Ltd.

Check-Out Planning Services Ltd. is comprised of a tightly knit group of like-minded professionals and is supported by industry consultants, mentors, family and friends. We are passionate about helping people prepare for the unexpected and at the same time, create a legacy they are proud to share. Like so many others, this team has lived through the loss of loved ones. They have experienced the trauma of making tough decisions on behalf of the departed, without the benefit of their guidance. CheckOutPlan™ is our response to a real problem, shared by many of us. Find CheckOutPlan on [Facebook](#) and [LinkedIn](#).

To learn more, visit:

“The Story of Check-Out”

<https://spark.adobe.com/page/PsPf7csTU0pvf/>

For images, relevant articles, and bios please visit the [CheckOutPlan media page](#).

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