

The Other Half of Estate Planning: What Your Family Needs Beyond Your Will

A free, practical session for your chapter, presented by **Estate Kit founder Amy Baryshnik**

Most Canadians leave their families a scavenger hunt. A Will says who should handle an estate, but it does not tell a family what exists, where to find it, or how to step in. We built Estate Kit, the first Canadian estate readiness platform, to take families from “we know we should get this sorted” to “we are fully organized and prepared.” It gives families a secure system of record for accounts, policies, contacts, documents and personal instructions, with sharing controls so the right person can step into someone’s shoes during incapacity or after death. This free session covers the half of estate planning that comes after the legal work.

WHAT YOUR MEMBERS WILL LEARN

- **What to revisit in an existing plan**, including whether the executor and Power of Attorney they named years ago are still the right people, and whether beneficiary designations need updating.
- **How to build a simple inventory** of what they own, what they owe and what protects them, so family knows where to start.
- **How to prepare their digital life**, including the critical information that now sits behind a locked phone and two-factor authentication.
- **What the people they have named actually need to know**, and the conversations worth having while they can still answer the questions themselves.

Every step covered is something members can act on themselves, without purchasing anything. Attendees consistently tell us this is the session they did not know they needed, and they leave with printed materials to take home.

HOSTING IS EFFORTLESS

Your format, your topics

30 to 60 minute formats, including Q&A, are common, but we adapt to your schedule and tailor content to your chapter. Nearby chapters can combine for one session.

In person or virtual

Amy presents in person across the GTA and virtually anywhere in Canada, including to audiences of 500.

We come prepared

Amy brings the presentation and printed take-home materials for members, plus ready-to-use promotional copy for your newsletter. We coordinate with you in advance on the setup that suits the room.

FREE TOOLS FOR MEMBERS

Our five-minute **Estate Readiness Assessment** scores members’ readiness out of 100 with practical next steps, our **Help Me Choose** tools walk through selecting an executor, attorney or guardian, and our **Knowledge Hub** answers the questions families ask most. All free to share in your chapter communications.

WHY ESTATE KIT WAS FOUNDED

“Ten years ago, my dad was being wheeled into brain surgery. He grabbed my arm and said, ‘If this goes sideways, you’re my decision-maker on everything.’ I froze.”

Amy Baryshnik is the Founder and President of Estate Kit, the first Canadian platform purpose-built for estate readiness. She started Estate Kit after a health scare in her own family showed her how hard it is to step in for someone you love when their information is not organized, even in a family full of professionals. Before Estate Kit, Amy spent nearly two decades in senior operating and investing roles at Apollo, Alignvest, Knix, and UBS. She holds an MBA from Harvard Business School and an HBA from Ivey Business School.