

# UMT COACHING

# SMART NEXT OF KIN

2025



UMT Coaching, LLC

Uplift - Motivate - Transform

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## Your legacy is too important to leave to chance!

**At UMT Coaching**, we empower individuals to take control of their future, ensuring their loved ones are protected and their estate is seamlessly managed.

Imagine the peace of mind that comes from knowing your affairs are in order, your financial assets, personal directives, and key decisions carefully planned to safeguard your family's well-being. That's exactly what our **UMT Coaching Smart Next of Kin Program** provides strategic guidance to help you prepare today and protect tomorrow.

**At UMT Coaching**, we are thrilled to guide individuals like you on a transformative journey of recalibration, helping you take charge of your future with clarity and confidence. We are deeply committed to uplifting, motivating, and igniting meaningful change in every aspect of your life.

# WELCOME







As a vital part of your estate planning strategy, **UMT Coaching Smart Next of Kin** ensures that your legacy remains protected, your wishes are honored, and your loved ones are well-prepared for any transition.

During our session, we will provide expert guidance to help you:

- Organize key financial and personal affairs for seamless succession
- Establish clear directives to safeguard your assets and loved ones
- Cultivate a proactive mindset for estate management and future security

Taking action today means securing peace of mind for tomorrow. We look forward to partnering with you on this journey, because **Smart Next of Kin** keeps your legacy in order.

# WELCOME

CONT'D



# MEET OUR COACH

JB  
FOUNDER & ME  
STRATEGIC COACH



**Helping purpose-driven individuals build wealth across every dimension of life: spiritually, mentally, socially, physically, and financially.**

With more than 15 years of experience guiding clients toward clarity, confidence, and impact, JB specializes in coaching individuals and organizations to build lives and legacies that reflect intentional purpose, not default circumstance.

Armed with a Master's in Organizational Leadership & Innovation with a Financial Management focus, and certified through the Fierce Coaching Program, JB brings a rare blend of strategic insight and emotional intelligence. Her coaching centers around five powerful pillars: connection, resilience, delegation, feedback, and accountability.

JB works with clients to identify the life patterns they've aligned with, often unconsciously, and recalibrate those frameworks to better reflect their vision and values. Whether addressing smart money management, estate planning, life transitions, leadership development, or brand clarity, her forward-thinking, results-driven approach helps clients move from uncertainty to intentional action.

Through customized coaching, workshops, and digital solutions, she empowers clients to create an authentic blueprint for success. Together, you'll establish clarity around whether you're living a **called life** or one you've simply drifted into.

Every interaction is guided by the principle that **"iron sharpens iron"**, because surrounding yourself with growth-minded people is the bedrock of transformation.

**JB's Goal:** help clients unlock the fullest version of themselves and build wealth—beyond finances—in every corner of their life.

4





# Four Ways To Participate With Confidence

If managing your legacy ever felt overwhelming, you're not alone.

That's why we created the **UMT Coaching Smart Next of Kin Program**. A simple, powerful solution built to give you clarity and confidence with your estate planning.

We offer **four levels of service** to meet you where you are, whether you prefer to work independently or would benefit from full, personalized support. Each option is designed to match your comfort level with navigating Microsoft Excel. From a self-paced, do-it-yourself experience to our hands-on, white-glove service, you can choose the level of guidance that's right for you.

Participation in all service levels of **UMT Coaching Smart Next of Kin** requires use of a personal laptop and access to Microsoft Excel. These tools are necessary to complete, store, and manage your personalized planning documents.

No matter which option you select, our goal remains the same: to help you prepare today and protect tomorrow with clarity and confidence.



Service

Support

Accountability

# WHAT'S INCLUDED



## WORKSHOP

- Welcome Video
- 4-Hour In-Person (Hands-On) Working Session  
Question & Answer session with a Financial Advisor
- Q&A with an Estate Attorney
- UMT Coaching Reference Guidebook
- UMT Coaching Digital Workbook
- Email Support for 30 Days  
(within 30 days after the workshop)
- Lunch

# WHAT'S INCLUDED



## CLARITY

- Welcome Video
- UMT Coaching Comprehensive Reference Guidebook
- UMT Coaching Digital Workbook
- Email Support for 30 Days  
(within 30 days after the workshop)



# WHAT'S INCLUDED



- Welcome Video
- 1 Coaching Session (within 30 days of purchase)
  - Virtual / In-Person
  - In-Person session may be offered at a law firm or senior living community
- UMT Coaching Reference Guidebook
- UMT Coaching Digital Workbook
- Estate Attorney Referral
- Email Support for 30 Days (within 30 days of purchase)

PREMIER

8

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# WHAT'S INCLUDED



- Welcome Video
- 3 Coaching Sessions (within 60 days of purchase)
  - Virtual / In-Person
  - In-Person session may be offered at a law firm or senior living community
- UMT Coaching Reference Guidebook
- UMT Coaching Digital Workbook
- Estate Attorney Referral
- Email Support for 30 Days (within 30 days of purchase)

VIP

# SESSION ASSIGNMENTS

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## VIP CLIENTS

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If you decide to select our **VIP Package**, this entails our comprehensive, white-glove service, you will receive step-by-step support through a wide range of essential end-of-life planning topics. Within the **three personalized sessions**, we will help document and organize key information including access to cell phones and passwords, financial and investment accounts, personal and business expenses, and any investment properties. We also cover employer and business ownership details, children and pet care instructions, and an emergency contact and notification list. You will be guided through documenting social media and email account information, funeral preferences, and the location and content of other vital documents. This service is designed with care and sensitivity to ensure your wishes are clearly recorded and your loved ones are protected with clarity and peace of mind.





# ACCOUNTABILITY

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## PARTNER

### ACCOUNTABILITY COMMUNITY

After successfully completing our **UMT Coaching Smart Next of Kin Program**, past clients are invited to join our exclusive **'Accountability Community'**. Reach out for a check-in to discuss life changing events that can affect the administrative part of your estate planning landscape.

Allow for the opportunity to **"Dig Deeper"**, you will receive a yearly check-in coaching session to track any updates that need to be captured in your digital workbook and supporting documents.

Please note, this **"Dig Deeper"** service incurs an additional fee.



# SCHEDULING

## ELEVATE YOUR ESTATE PLANNING WITH SMART NEXT OF KIN

Streamline, simplify, and safeguard your legacy with the **UMT Coaching Smart Next of Kin Program**, a seamless digital solution designed to enhance estate planning efficiency while providing peace of mind.

Ready to seamlessly transition into a digital format? Let's connect today to explore how **UMT Coaching Smart Next of Kin** can complement your estate planning.

**Book A Package Today  
On Our Website!**