



SOARING SPIRITS INTERNATIONAL: WIDOWED COMMUNITY ALLY PROGRAM

Confidently support and retain your widowed clients.

2,800 PEOPLE ARE WIDOWED EACH DAY IN THE UNITED STATES.

Soaring Spirits' Widowed Community Ally Program provides you with tools, training, and resources to help you compassionately and effectively serve your widowed clients.

As many as 60% of widowed people will change their professional service providers after their person's death.

The SSI Widowed Community Ally Program will position you as a trusted business partner for widowed people—driving client loyalty and deepening client relationships while significantly improving the client experience after a partner death.

Why Soaring Spirits?

- Largest network of widowed people in the world; 4.5 million served since May 2008
- Immediate access to resources for newly widowed people
- Inclusive, secular programming
- Weekly online and in-person programs for all widowed people

Things to Know about Your Widowed Clients



Widowhood is rated as the most stressful life event a person can experience.



Trauma causes the brain to pause, increasing the time needed for a grieving person to absorb information, and often requires adjustments to a professional's communication style.



Each widowed person's experience is unique, making ongoing training for multiple experiences valuable.



The ability to confidently and compassionately acknowledge a client's grief is a key factor in a grieving client's satisfaction and loyalty.



Widowed people are often the sole decision-makers for their households.

Grief Literacy Matters

I understand that not everyone is comfortable talking about grief, but this is a business transaction that resulted directly from my husband's death. This professional is asking me to allow him to invest the proceeds of my life insurance policy. If he can't talk to me about my loss or acknowledge the realities of my life, how can he handle my business?

~53-year-old widow
(Social media post viewed by nearly 1,000 people)



Soaring Spirits Community Demographics

Participants live in all 50 US States and Canadian Provinces and territories.

53

AVERAGE AGE

60%

PARENT MINOR CHILDREN

- Soaring Spirits supports a younger widowed population—statistically likely to have 30 years of wealth management ahead of them.
- By 2030, women are expected to control as much as \$30 trillion of assets. (McKinsey & Company - July 29, 2020)

Est. 4.5 million people served since 2008



Your Soaring Spirits Toolkit Includes:

"Newly Widowed" Packets

- Introduction to immediate resources for people widowed less than a year

Adaptable Custom Messaging for Your Widowed Clients

- SSI custom condolence cards.
- Messaging for acknowledging a death
- Annual holiday messaging for widowed clients

Widowed Community Ally Certificate

- A visual cue to your clients that you are a Soaring Spirits Ally
- Delivered as a frameable certificate and as a digital icon

"You Are Not Alone" Wallet Cards

- Easy to carry resource cards for connecting widowed people to SSI programs
- Available in various sizes

What Professionals are Saying About Soaring Spirits Resources:

*I email a note and a Newly Widowed Packet to my recently widowed client. **She emailed me right away with heartfelt thanks.** Since then, I've mailed many packets and have heard from clients about how much they appreciated this resource— it's made me feel like something has been missing for the 34 years I've been in business. Now, I've made it my mission to make sure every client who loses a spouse gets one of these packets either in person or a few weeks after a condolence card. **EVERY** widow or widower should get one of these packets no matter how old they are.*

~Anne Lintz | State Farm Insurance

Premium Subscription

11-25 Client-Facing Roles

- Annual live interactive virtual session with expert trainer
- Promotional presence on Soaring Spirits website
- Self-paced Level One grief literacy training
- Curated quarterly content for widowed clientele
- Soaring Spirits Toolkit
 - Widowed Community Ally Certificate of Completion
 - 125 Co-Branded Outreach Cards
 - 125 You Are Not Alone Wallet Cards
 - 25 "Newly Widowed" Packets
 - 25 Custom SSI Condolence Cards

\$500/month or \$6,000/year

Standard Subscription

1-10 Client-Facing Roles

- Self-paced level 1 grief literacy training
- Curated annual content for widowed clientele
- Soaring Spirits Toolkit
 - Widowed Community Ally Certificate
 - 50 Outreach Cards
 - 50 You are Not Alone Wallet Cards
 - 10 Newly Widowed Packets
 - 10 Custom SSI Condolence Cards

\$100/month or \$1,200/year

Customizable Enhancements

Available at Any Subscription Level

- Discovery Call/Group Coaching with training and experts
- One-hour, in person, keynote address by Soaring Spirits International CEO
- Keynote by Expert Trainer
- Customizable Master Class by Expert Trainer(s)
- Discounted Newly Widowed Packets Bulk Purchase Option
- Discounted Outreach / Wallet Card Bulk Purchase Option
- Discounted Custom SSI Condolence Card Purchase Option
- Widowed Ally Desk Emblem Purchase Option

For corporations with more than 25 client-facing roles, contact us for custom pricing.

** One-time processing fee of \$150 will be added to each new subscription.*

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