

## Power Your Agency the Wise Way



## YOUR GUIDE TO USING THE ADVISOR DASHBOARD

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### Contents

Introduction.....	3
A. Logging in to your Advisor Dashboard.....	4
B. The Dashboard Elements—Left Side Navigation.....	5
C. Opportunities .....	6
D. Your Profile and the Provider Directory .....	7
E. Certification .....	11
F. Benefits .....	11
G. Help Center .....	12
H. Settings.....	12
I. Logout of Account.....	12
J. Manage My Plans .....	13
K. Dashboard Elements—Center Section .....	14
1. My Families.....	14
2. Tools.....	15
Final Expense / Term Quotes.....	16
Preneed Insurance Quotes.....	17
Create a Client Plan.....	18
Email Plan Invitation .....	19
Rocket Lawyer .....	19
Login to Wellabe .....	19
Documents & Guides .....	20
L. Manage My Plans.....	21
M. Adding the Advisor Dashboard to Your Mobile Device.....	23

If you need assistance, contact us at [support@funeralwise.com](mailto:support@funeralwise.com).

## **WHO IS FUNERALWISE?**

Funeralwise is a third-party marketing group and software supplier dedicated to powering your preneed and final expense insurance marketing. In other words, our tools and resources can help you take your preneed sales to the next level.

When agents and agencies affiliate with us, they get access to our industry-leading capabilities. These resources will supplement those of your agency to give you an edge in the preplanning market and help you reach and surpass your goals.

## **INTRODUCTION**

### ***Welcome to the Funeralwise for Agents Dashboard!***

The Funeralwise for Agents Dashboard is your gateway to our Wise Planning System (WPS). The WPS is a comprehensive online funeral planner you can share with your clients. This valuable tool is the perfect way to strengthen client relationships and give you an edge in the marketplace.

When you take advantage of Funeralwise subscription services, you get the power of the planning system. You also get membership in FEPSA (Final Expense Planning Specialist Association). Full FEPSA members have access to essential legal documents and more. You'll find access to these documents on your Dashboard.

On page 12, you'll see information on the help and training features you can access via the dashboard. We recommend that you take full advantage of these valuable educational materials.

Lastly, keep an eye on the emails that we send you. These emails are the best way to keep up with new features and important updates to our tools and resources.

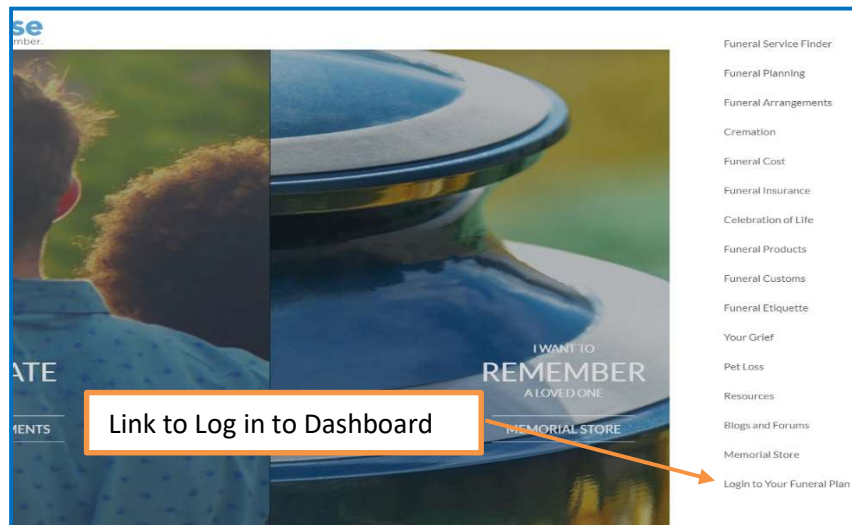
Please don't hesitate to let us know if you have questions regarding the dashboard or any of the features of the dashboard. We welcome your suggestions on how we can improve.

## A. Logging in to your Advisor Dashboard

1. From our main website at <https://www.funeralwise.com>, navigate to the dropdown menu by clicking the “hamburger menu” in the upper right-hand corner.



2. Click the “LOGIN TO YOUR FUNERAL PLAN(S)” link at the bottom of the menu or go directly to <https://planning.funeralwise.com/advisor/login>.



3. Enter the email and password you specified when registering your account. If you have forgotten your password, click the link above the “Log In” button. We will email you with instructions on how to reset your password.

FUNERALwise  
WISE PLANNING SYSTEM

Login to My Plans

Email Address:

Password:

Don't remember your password? [Click here.](#)

LOG IN

Privacy Policy | Terms of Service | Contact Us  
Copyright 2022 © Funeralwise LLC. All rights reserved.

ACCREDITED BUSINESS  
BBB Rating: A+  
As of 11/13/2022  
Click for profile

TRUSTe SECURE

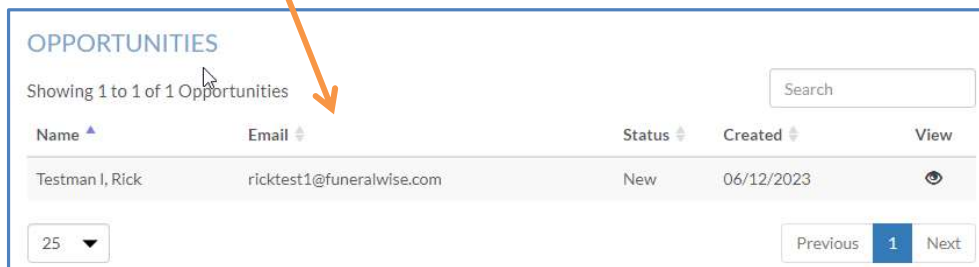
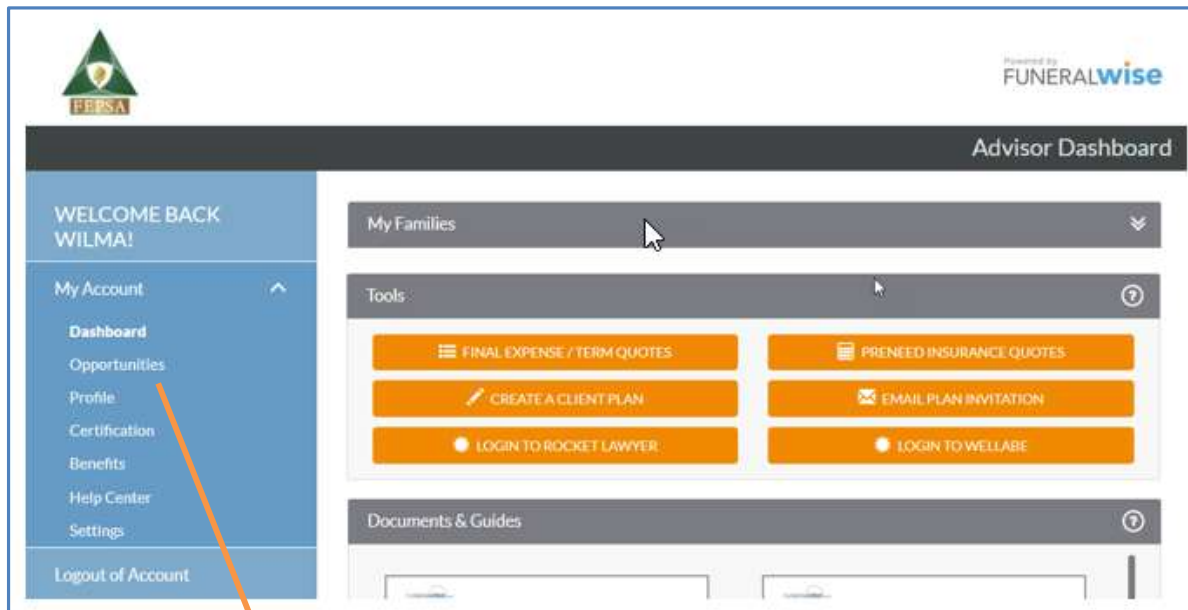
## B. The Dashboard Elements – Left Side Navigation

The left side menu of the Advisor Dashboard gives you access to all the tools and information resources available to you:

1. Dashboard (the main Dashboard page).
2. Opportunities (track the progress of your sales leads).
3. Profile (your online personal profile).
4. Certification (how to earn FEPS certification).
5. Benefits (supplemental benefits like Rocket Lawyer).
6. The Help Center (how-to videos and guides).
7. Settings (password and email).
8. Logout of Account.
9. Manage My Plans (your personal funeral plans).

## C. Opportunities

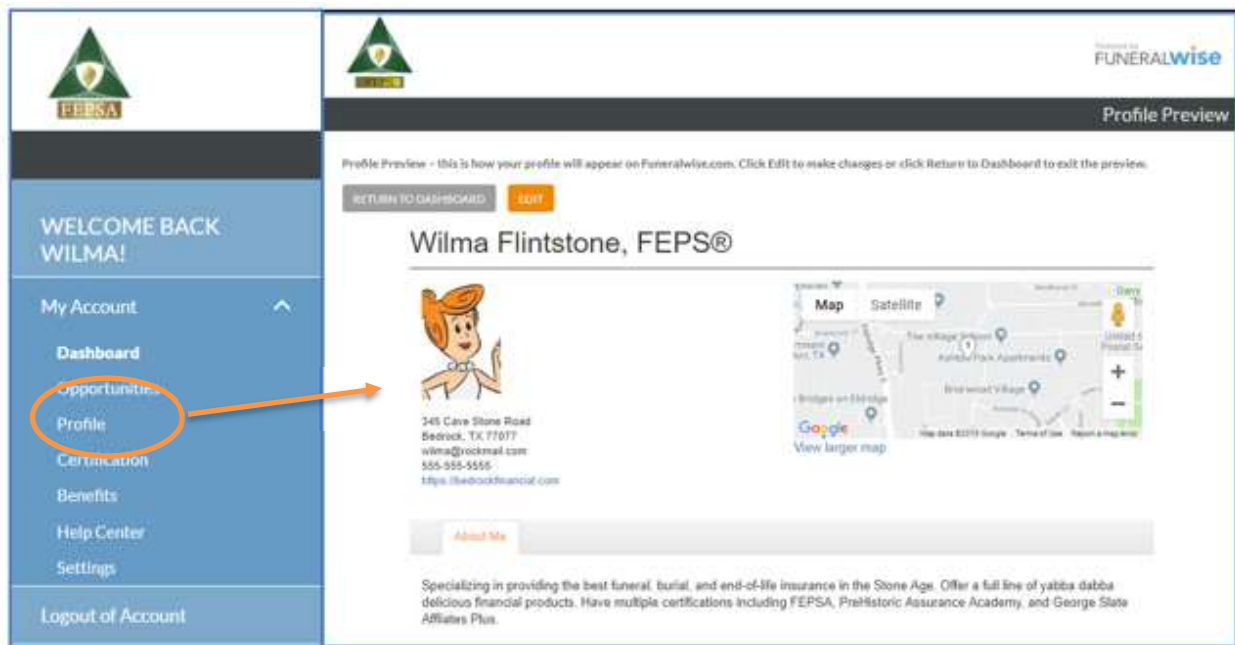
The Opportunities section of the Dashboard leads you to a module that helps you keep track of your sales leads. More information on the Opportunities module can be found in the Help Center.



## D. Your Profile and the Provider Directory

You initially created your Profile when you registered with Funeralwise.com. You can update your Profile by clicking the link in the side menu.

The first thing you see when you click on the **Profile link** is a Preview of how your profile will appear on Funeralwise.com – see next page.



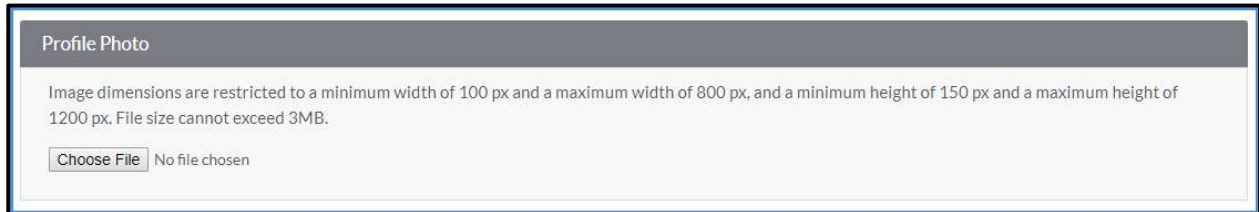
Click the **Edit button** to change your profile – see next page.

This is the Advisor Profile Edit page.

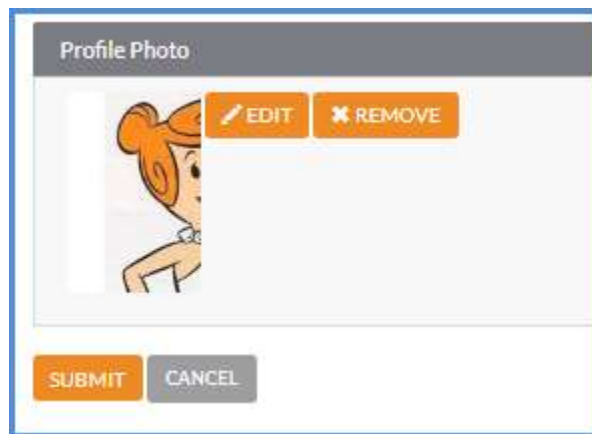
Here, you can also change your profile photo. Just click **Remove** and then upload a new image – see next page.



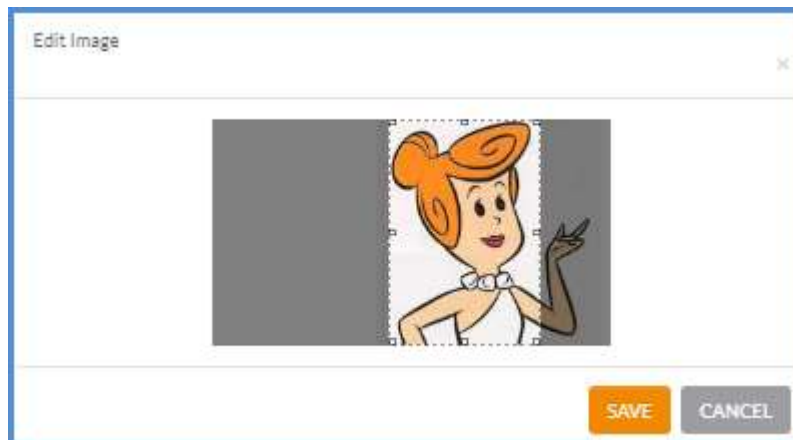
When you upload a new image, note the image dimensions and file size restrictions.



When you first upload an image, you can make minor edits by clicking the **Edit** button.



In Edit mode, you can crop and reframe your photo. Be sure to **Save** your changes.



Your Profile is available to the public in our Advisor Directories, as shown below. It is also shown on the FEPSA website. Include your photo and an About Me description in your profile.

## Our main Search Provider Directory

**FIND FUNERAL HOME, CEMETERY, CREMATION AND OTHER FUNERAL PROVIDERS**

Funeralwise Preferred Advisors

- 1 Ralph C. Wilczek, FEPS® - 119 Bethel Mill Road, Sewell, NJ, 08080
- 2 Annmarie Wilczek, FEPS® - 119 Bethel Mill Road, Sewell, NJ, 08080
- 3 Wilma Flintstone, FEPS® - 119 Bethel Mill Road, Sewell, NJ, 08080

Click on a listing to open the Advisor Profile

## Our Advisor-only Directory

LOGIN TO YOUR FUNERAL PLAN(S)

**FUNERALwise**  
Prepare. Celebrate. Remember.

Funeral Planning ▾ Funeral Customs ▾

New Jersey (NJ)

Dave Harewood Bloomfield, NJ	Ralph Lagriola, RFC, CSA, LUTCF Hasbrouck Heights, NJ	Natalie Hunt North Brunswick, NJ
Ralph Wilczek Sewell, NJ	Annmarie Wilczek Sewell, NJ	Wilma Flintstone Sewell, NJ

← BACK

**WILMA FLINTSTONE, FEPS®**

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Bedrock, TX 77077  
wilma@rockmail.com  
555-555-5555  
https://bedrockfinancial.com

About Me

Specializing in providing the best funeral, burial, and end-of-life insurance in the Stone Age. Offer a full line of yabba dabba delicious financial products. Have multiple certifications including FEPSA, PreHistoric Assurance Academy, and George Slate Affiliates Plus.

## E. Certification

The Certification section contains the information you need to prepare for your FEPSA Certification. You can also schedule your test day and time in this section.

The screenshot shows the 'Certification' section of the Advisor Dashboard. On the left is a navigation menu with 'WELCOME BACK WILMA!' at the top, followed by 'My Account' (with an upward arrow) containing links for Dashboard, Opportunities, Profile, Certification (highlighted), Benefits, Help Center, and Settings. Below this are 'Logout of Account' and 'Manage My Plans'. The main content area is titled 'FEPS CERTIFICATION' and contains the following text: 'In order to become a certified FEPS<sup>®</sup> Advisor, you must pass the proctored certification exam with a passing score of 70% or better. The cost to take the exam is \$25. To schedule a time slot to take the exam, click on the calendar icon below.' Below this is a note: 'The FEPSA exam calendar is temporarily down for maintenance. We apologize for the inconvenience.' This is followed by the instruction: 'Please call 1-855-600-2332 to schedule a block of time for your FEPS proctored on Mondays, Wednesdays or Thursdays at 10 am, 12 pm or 4 pm.' A calendar icon is displayed. At the bottom, it states: 'When you open the calendar, you will be redirected to the FEPS<sup>®</sup> Exam Booking Platform. Choose one block of time to schedule your 120-minute FEPS<sup>®</sup> proctored exam. For example, choosing 10 AM will reserve your exam time starting at 10 AM and ending at 12 PM. Once selected, make sure to click the "Confirm Booking" button to reserve your spot and make payment of which you will receive a confirmation email.'

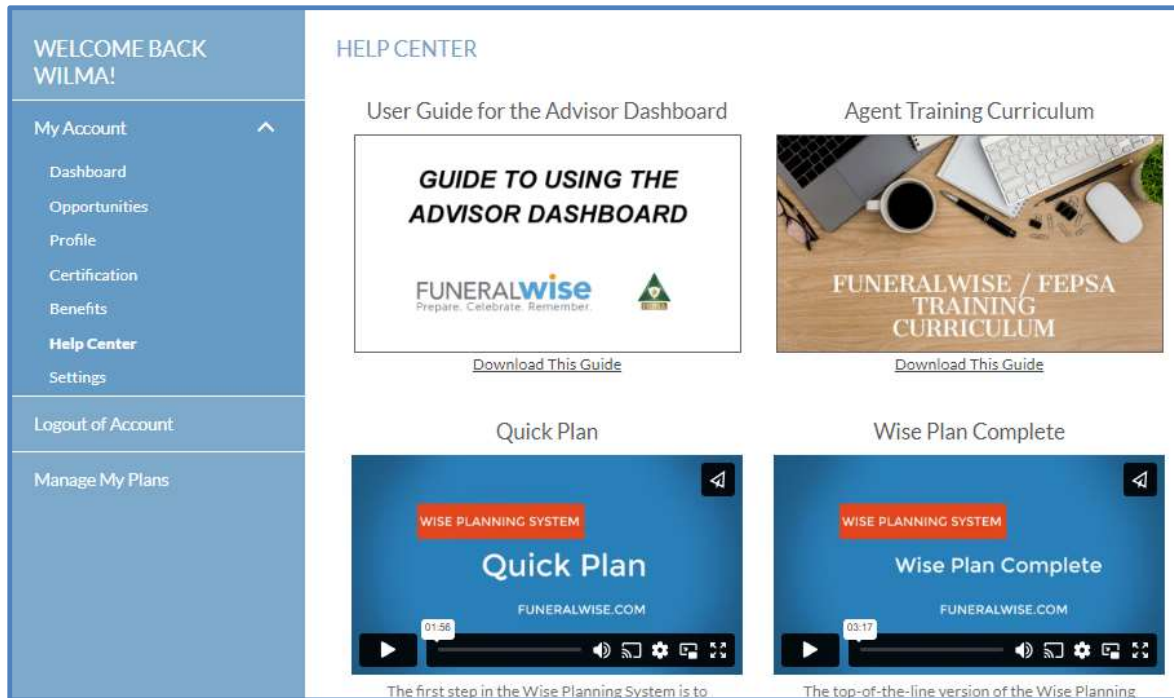
## F. Benefits

The Benefits section details the full slate of benefits available through your FEPSA membership.

The screenshot shows the 'Advisor Benefits' section of the Advisor Dashboard. The navigation menu on the left is similar to the previous screenshot, but 'Benefits' is highlighted. The main content area is titled 'ROCKET LAWYER' and describes the service: 'Rocket Lawyer is a legal service that currently serves over 20,000,000 people worldwide. With this service both you and your client will have access to FREE legal documents covering all situations including estate planning documents such as Last Will and Testament, Living Will, Living Trusts and/or Power of Attorney. Additionally, you will receive FREE legal advice, FREE document review, and deep discounts on representation fees.' Below this is a warning: 'YOU MUST REGISTER THROUGH THE LINK WE PROVIDE FIRST OR ROCKET LAWYER WILL CHARGE YOU THEIR NORMAL RETAIL PRICE.' An orange button labeled 'ROCKET LAWYER REQUEST' is provided. The next section is 'CONTINUING EDUCATION CREDITS', which states: 'FEPSA members are entitled to vouchers to take the online classes needed to maintain your resident state life insurance license.' An orange button labeled 'CONTINUING EDUCATION REQUEST' is provided.

## G. Help Center

The Help Center contains various resources to help you make the most of your Advisor Dashboard.



## H. Settings

Visit the Settings page to change your account information, such as your email address or password.

## I. Logout of Account

You should log out of your account occasionally, for example, if you are working on a shared computer. To log out, select this option.

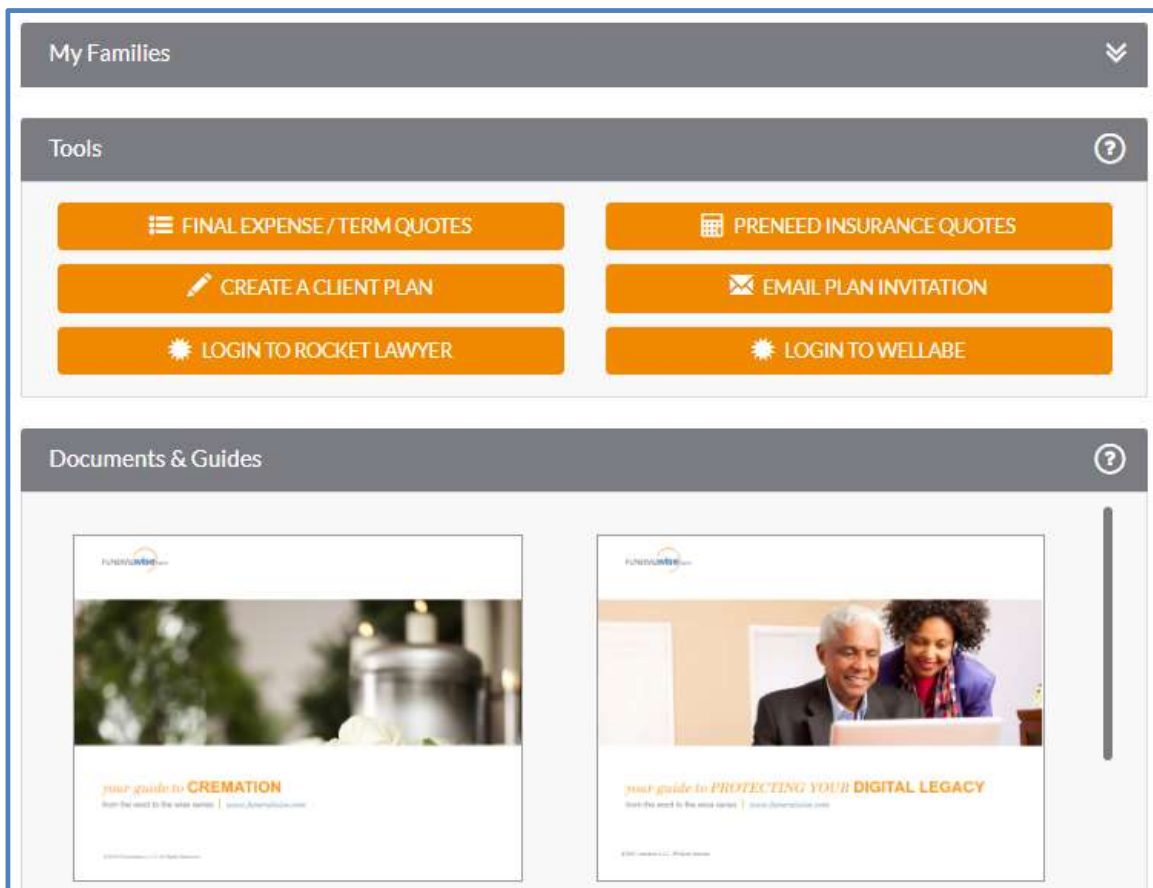
## J. Manage My Plans

We recommend that you create a plan for yourself and your family members. Plans you create for yourself can be found in this site area.

## K. Dashboard Elements-Center Section

The center section of the Dashboard page contains three elements:

1. My Families (your clients' funeral plans).
2. Tools (funeral planning tools).
3. Documents & Guides (Word to the Wise Guides, Planning forms, etc.).

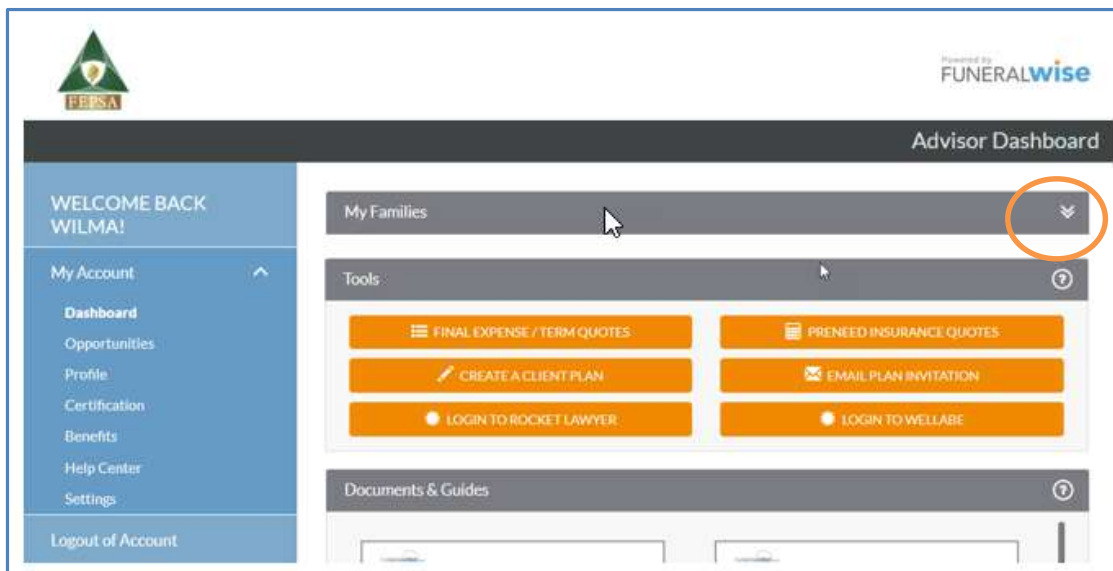


## 1. MY FAMILIES

At the top of the page, under the headline, *My Families* is a list of all the funeral plans created via the Advisor Dashboard. In other words, these are plans you have created for others.

On the right-hand side are clickable options that include **View**, **Edit** (make changes to the plan), **Mail** (to send an email using your default email program), and **Notes** (to make notes about the plan).

Within the gray header bar is a double arrow. Click on the arrow to open and close your list.



Family Name	Account Name	Plan Name	Info	View	Edit	Notes
Rubble Family	Betty Rubble	Rubble 1				PDF

## 2. TOOLS

The Tools section of the Dashboard includes a variety of utilities to help you better serve your families.



The utilities in this section of the Dashboard are your best resource for working with your clients. From getting the best quotes for either Final Expense Insurance or Preneed to accessing our industry-leading planning tools, you'll find everything you need to provide your clients with state-of-the-art services.

On the following pages, you'll find more details on how to use each tool.

## FINAL EXPENSE / TERM QUOTES

Here, you can get final expense and term insurance quotes for hundreds of insurance companies. Click the gear icon in the upper right corner to access the list of insurance companies. You can select the carriers you want to see in your quotes.

Please note that if your agency has a preset list of carriers for which they offer policies, you will not see the gear icon.

You can select a coverage amount from the dropdown or enter an amount by clicking on the pencil icon.

You can select a birth date or choose an age.

Click on PDF for a printable PDF version of the quotes you can give your client/prospect.

The screenshot displays the 'Insurance Quotes' interface. On the left is a blue sidebar with navigation links: 'WELCOME BACK WILMA!', 'My Account' (with sub-links: Dashboard, Opportunities, Profile, Certification, Benefits, Help Center, Settings), 'Logout of Account', and 'Manage My Plans'. The main content area has a dark header 'Insurance Quotes' and a sub-header 'FINAL EXPENSE QUOTES / (TERM QUOTES)'. Below this is the 'Information About The Insured' section with the following form fields:

- Insurance Type: Level Payment
- Coverage Amount: \$10,000
- State: IL-ILLINOIS
- Birth Date / (Age): January 15, 1965
- Gender: Male
- Tobacco Use?: No

A gear icon in the top right corner of the form area is highlighted with an orange arrow. Below the form is an orange 'GET QUOTES' button. At the bottom, there is a table showing a quote for NSS Life:

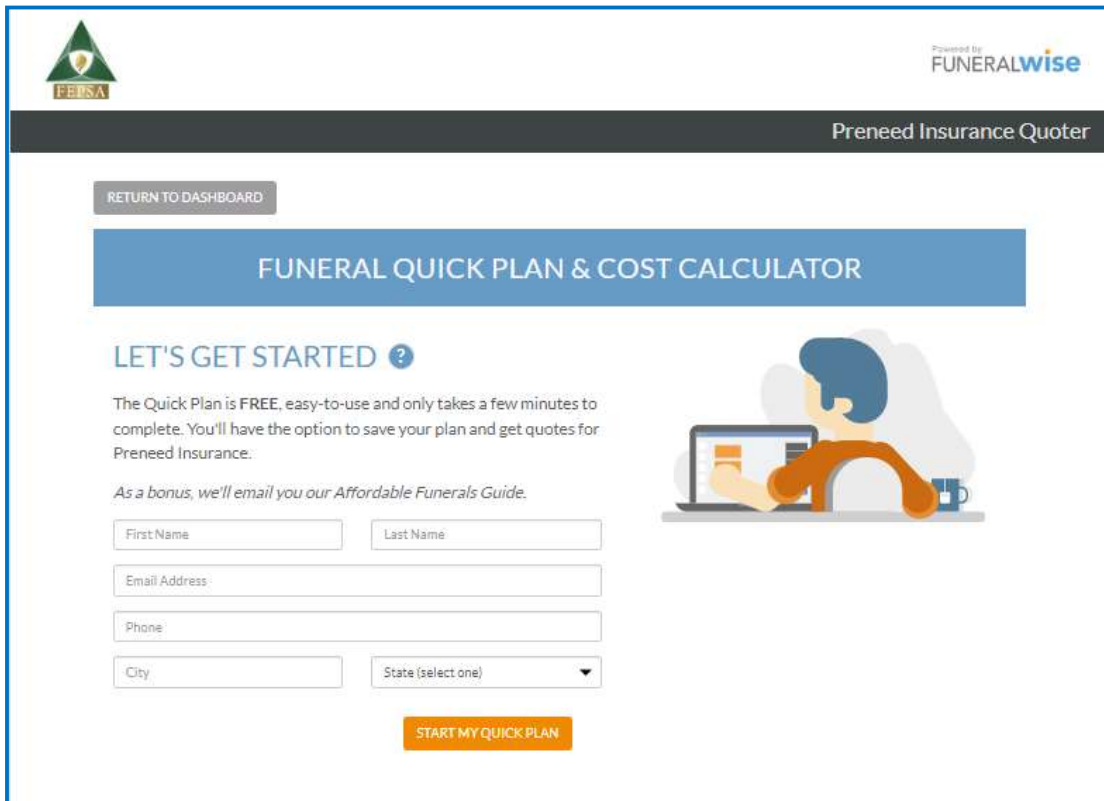
Company	Guide	Annual	Monthly	Plan Name
NSS Life Family Masters...		\$347.80	\$31.30	Whole Life



## PRENEED INSURANCE QUOTES

**“Preneed Insurance Quotes”** is a vibrant wizard that enables you to find policies based on the specific criteria you designate. It offers you a full range of policy types and premium prices.

Start with the Quick Plan & Cost Calculator to generate a preneed insurance quote.



The screenshot displays the 'Preneed Insurance Quoter' interface. At the top left is the FEPSA logo, and at the top right is the 'Powered by FUNERALwise' logo. Below the header is a dark bar with the text 'Preneed Insurance Quoter'. A 'RETURN TO DASHBOARD' button is located in the top left of the main content area. The main heading is 'FUNERAL QUICK PLAN & COST CALCULATOR'. Below this is a 'LET'S GET STARTED' section with a question mark icon. The text explains that the Quick Plan is free, easy-to-use, and takes a few minutes to complete. It also mentions a bonus email of the 'Affordable Funerals Guide'. To the right of the text is an illustration of a person sitting at a desk with a laptop and a coffee cup. Below the text are several input fields: 'First Name', 'Last Name', 'Email Address', 'Phone', 'City', and 'State (select one)'. At the bottom of the form is an orange 'START MY QUICK PLAN' button.

**“Funeral Quick Plan & Cost Calculator”** is a powerful utility that lets you quickly calculate an estimate of final expenses. This can be helpful when working with a client to determine how much insurance to purchase.

As you advance through the wizard, you will make various selections to generate the cost estimate. The estimates are based on our survey of U.S. Industry average prices. These costs are intended for planning purposes only.

You can select a specific funeral provider as you continue to add more detail to your plan. If the provider you choose has provided us with their pricing, you will see their specific prices for your selected choices.

**The most effective way to learn what the system offers is to create a plan for yourself. We highly recommend that you put the elements of the wizard and the planner through their paces before rolling them out to your client families.**

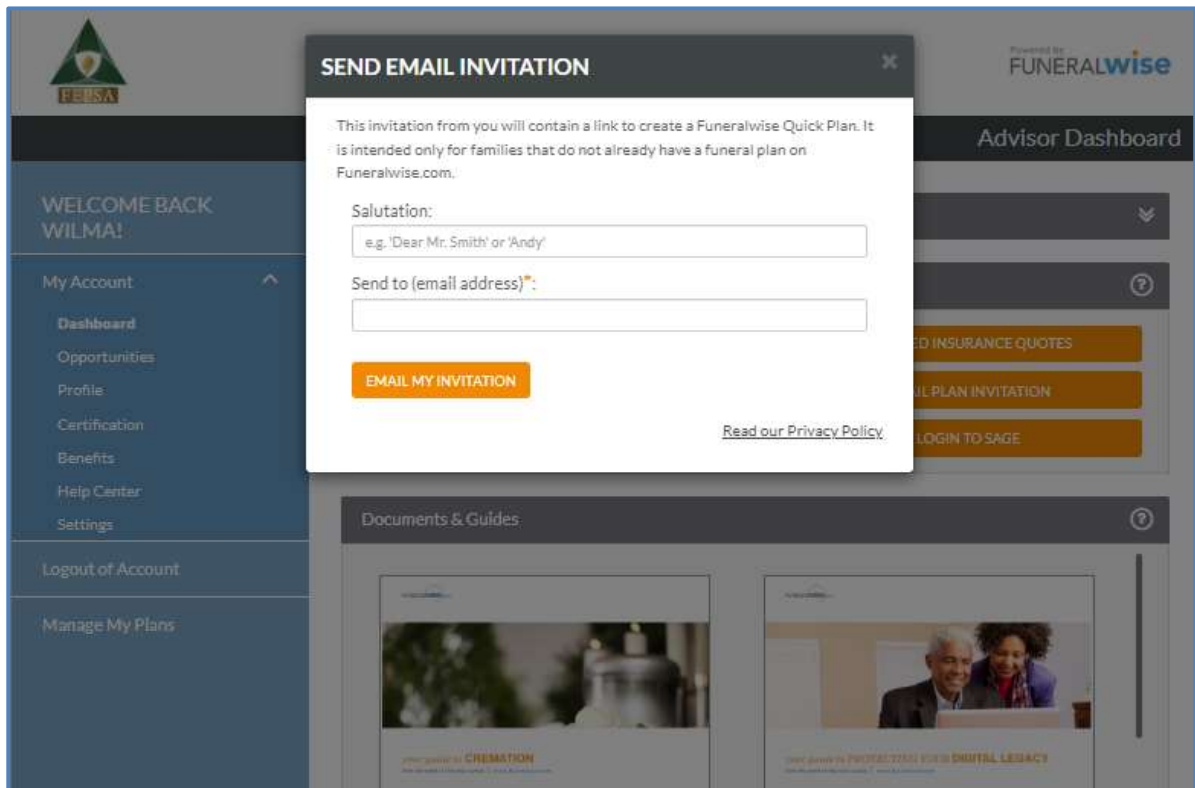
Additional help on using the system can be found in the help section of the Advisor Dashboard and through the tooltips located throughout the system (Question marks within a blue circle are tooltips).

## **CREATE A CLIENT PLAN**

***“Create A Client Plan”*** enables you to create plans for your clients. This is something you might do as part of a client meeting. When a plan is created, it will be added to the *My Families* section of your Dashboard. (See the videos in the Help Center for tutorials on using the funeral planner.)

## EMAIL PLAN INVITATION

“**Email Plan Invitation**” allows you to email a link to your client that enables them to create a funeral plan on their own. When they use this link to create a plan, they will be added to My Families in your Dashboard. Clicking the Email Plan Invitation button prompts you to enter your client’s email address. You can include only one email address at a time.



**Important:** Be aware that when a plan is added to your My Families, you have been added as a Plan Guardian for that funeral plan. The plan owner (i.e., your client or prospect) can limit your access to their plan to “view only” or remove you as a Plan Guardian, which will remove their plan from your My Families.

## ROCKET LAWYER

“**Rocket Lawyer**” is added to your Toolbox once you complete FEPSA enrollment. For more information on how to take advantage of these benefits, contact FEPSA directly.

## LOGIN TO WELLABE (formerly Great Western)

You can log in to your account in the Wellabe agent portal.

## DOCUMENTS & GUIDES

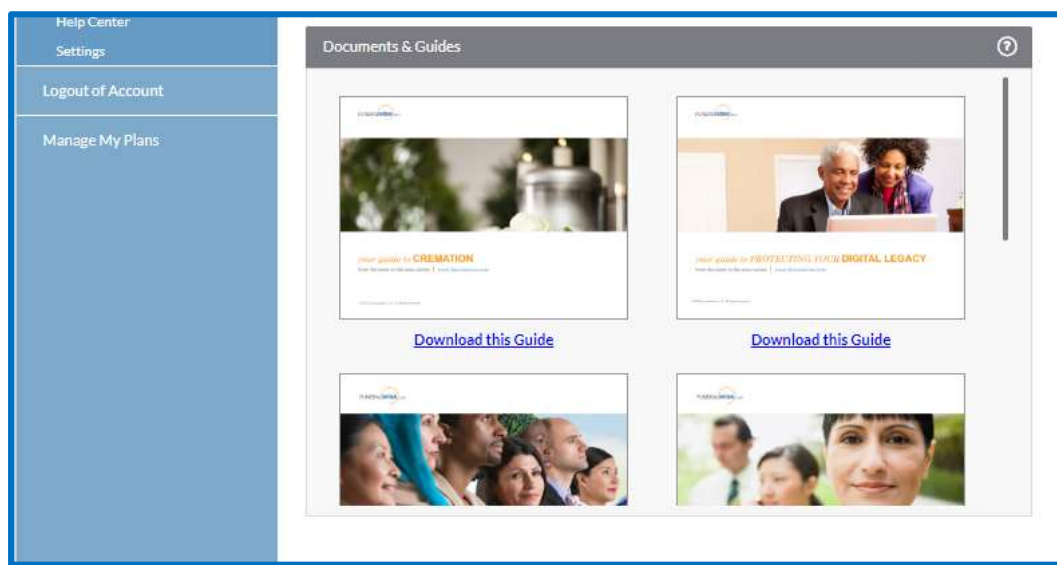
Funeralwise publishes various documents to help people navigate the complex end-of-life planning process. We encourage you to invite your clients to visit the funeral planning section of our site for more information on the process. Visit <https://www.funeralwise.com/plan/>.

As a member of the Funeralwise community, you are invited to share our series of **Word to the Wise Guides** with your clients. We request that you only distribute these publications to those who have engaged you to help with their end-of-life insurance needs.

The Funeralwise Word to the Wise guides and funeral planning forms are available for sharing with your families. Click the link to download a PDF version of the document. The Guides may not be altered in any way. They are intended for sharing solely with families who have hired you to provide advisor services, and they may not be distributed for promotional purposes.

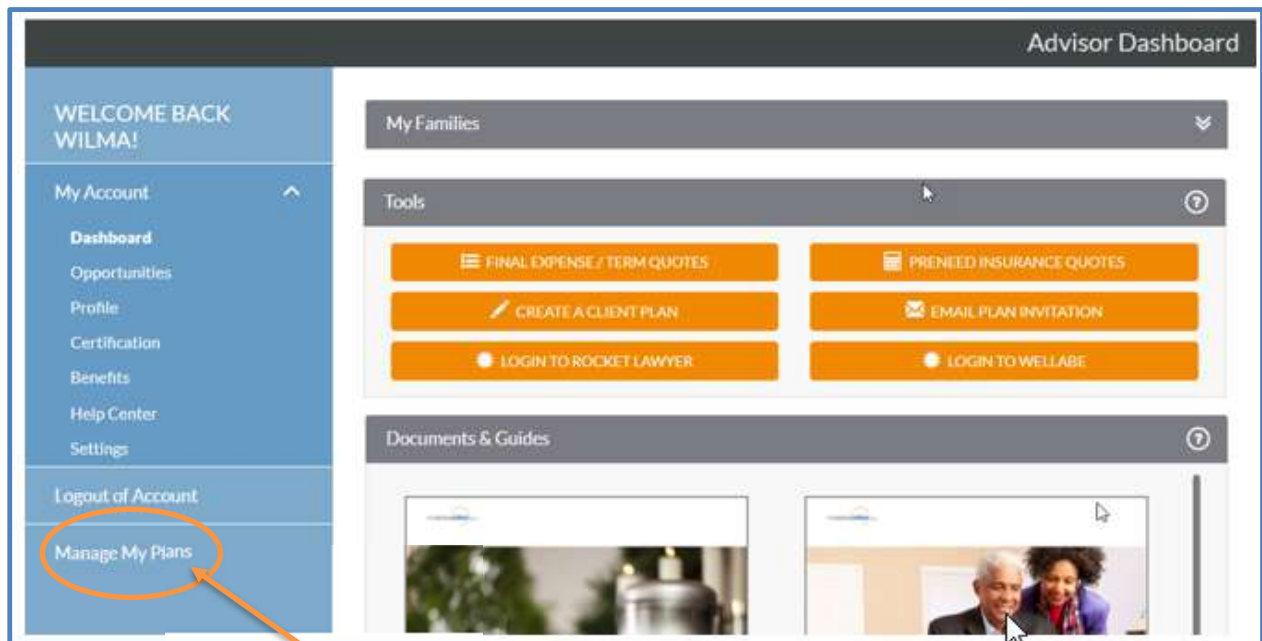
The Funeral Planning section of Funeralwise.com is another excellent source of information to help your families navigate the process of making funeral arrangements, creating a celebration of life, and handling post-funeral matters.

Visit <https://www.funeralwise.com/plan/>



## L. Manage My Plans

The best way to learn how to use the funeral planner is by creating your own plans. Click on the **Manage My Plans** link on the side menu to access your personal funeral planner. Here, you can generate funeral plans for personal use and train yourself on how to use the planner.



Once you have selected “Manage My Plans,” you will be presented with a listing of all the plans you have created for your personal use. Select the plan you want to view or modify by clicking the “UPDATE THIS PLAN” button for that specific plan.

The screenshot displays the 'Manage My Plans' interface. At the top left is the FEPSA logo, and at the top right is the 'Powered by FUNERALwise' logo. The main header reads 'Manage My Plans'. On the left sidebar, there is a 'WELCOME BACK WILMA!' message, a 'My Account' menu with options like Dashboard, Opportunities, Profile, Certification, Benefits, Help Center, and Settings, a 'Logout of Account' button, and a 'MY PLANS' section with links for 'Wilma's Plan' and 'Fred's Plan'. A 'CREATE A NEW PLAN' button is also visible at the bottom of the sidebar.

The main content area, titled 'MY FUNERAL PLANS', features a 'VIDEO' button and a list of plans. The first plan, 'WILMA'S PLAN', shows:
 

- Funeral Selections:** Interment Choice: Cremation; Disposition of Ashes: Return to Family; Funeral Service: Memorial Service.
- Product Selections:** Urn: Sample Bronze Urn.
- Status:** A death has occurred - [Activate this Plan](#)
- Buttons:** UPDATE THIS PLAN, THIS PLAN'S GUARDIANS
- Metadata:** Date Created: August 08, 2022 1:57:05 PM; Last Updated: August 08, 2022 1:57:47 PM

 The second plan, 'FRED'S PLAN', shows:
 

- Funeral Selections:** Interment Choice: Cemetery Burial; Funeral Service: Memorial Service; Additional Services: Celebrant Services.
- Product Selections:** Casket: Sample Casket; Vault: Sample Concrete Plastic Lined Burial Vault; Marker: Sample Grave Marker.
- Status:** A death has occurred - [Activate this Plan](#)
- Buttons:** UPDATE THIS PLAN, THIS PLAN'S GUARDIANS
- Metadata:** Date Created: August 08, 2022 1:57:53 PM; Last Updated: August 08, 2022 1:58:26 PM

To learn more about all the features available for your plan, visit the Help Center.

## M. Adding the Advisor Dashboard to Your Mobile Device

You can add your Advisor Dashboard to your mobile phone or tablet by creating a bookmark on your home screen.

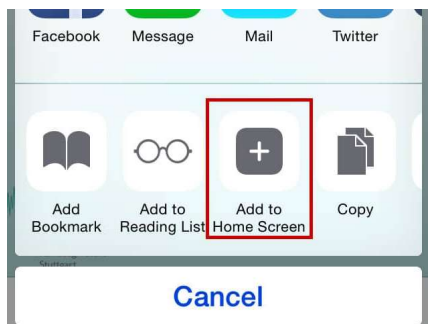
### For IOS 7 and 8

Open the Safari app on your iOS device.

Navigate to the Funeralwise FEPSA login page at:

<https://planning.funeralwise.com/fepa/advisor/login>.

Add a shortcut to this page on your home screen by tapping the “Upload/Share” icon at the bottom. This is the icon that appears to be a square with an arrow.



Select the “Add to Home Screen” icon

Select the “Add to Home Screen” icon. You can accept the default name, FEPSA, or give your button a new name. Click “Add” in the upper right-hand corner. You can now access the page from your Home Screen.

### Android

Launch Chrome for Android and open the website

<https://planning.funeralwise.com/fepa/advisor/login>. Tap the menu button and tap “Add” to the home screen.

For more information, visit <https://www.howtogeek.com/196087/how-to-add-websites-to-the-home-screen-on-any-smartphone-or-tablet/>.