FINTRA AFTERCARE · FULLY WHITE-LABELED

Grieve Well, Live Well

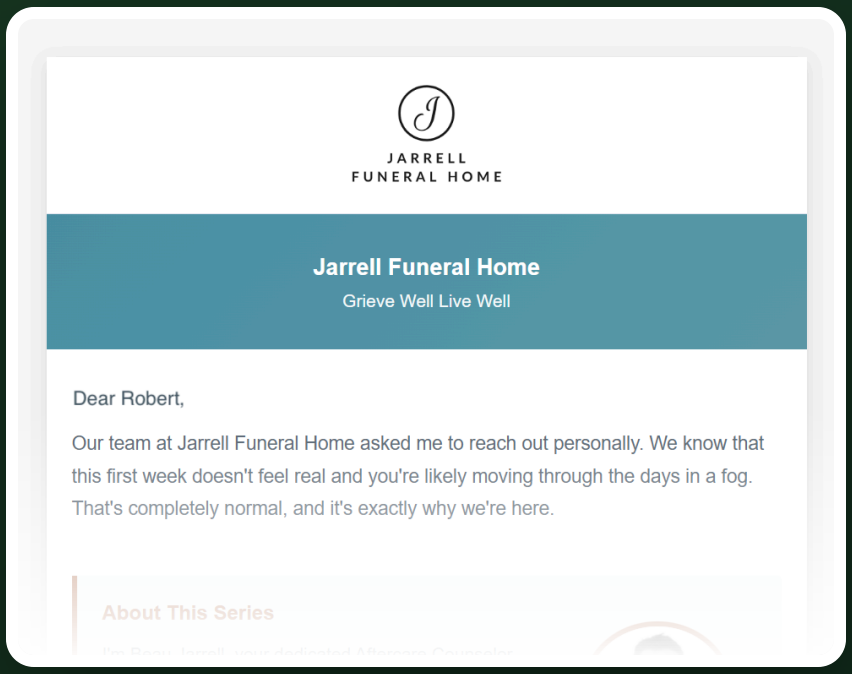
A year of care for every family you serve — in your name

A 12-month support series for at-need families — **genuine care first, always**. Real grief support from a real, named counselor, under your brand. We run all of it. You keep the relationship.

12 MONTHS OF CARE	**10** EMAIL LETTERS
5 COMFORT TEXTS	**1** NAMED COUNSELOR

EVERY TOUCHPOINT CARRIES YOUR BRAND

- Your logo & colors
- Your counselor's name & photo
- Sends from your email
- Your booking links
- Agent alerts
- Custom reply-to



An actual email from the series — **your logo, your counselor, your brand**

The journey through the year

The series moves *with* grief, not against it — most present in the raw early weeks, then a steady, lighter companionship through the first year. Planning is never mentioned until well in, and even then it's gentle and optional.

DAYS 1–60

Comfort & Resources

The most presence, when it's needed most — a personal introduction from the counselor, grief education, crisis resources up front, and gentle check-ins.

DAYS 60–120

Continued Support

When everyone else has moved on, the letters keep coming — companionship through the loneliest stretch, with the first entirely optional mention of planning.

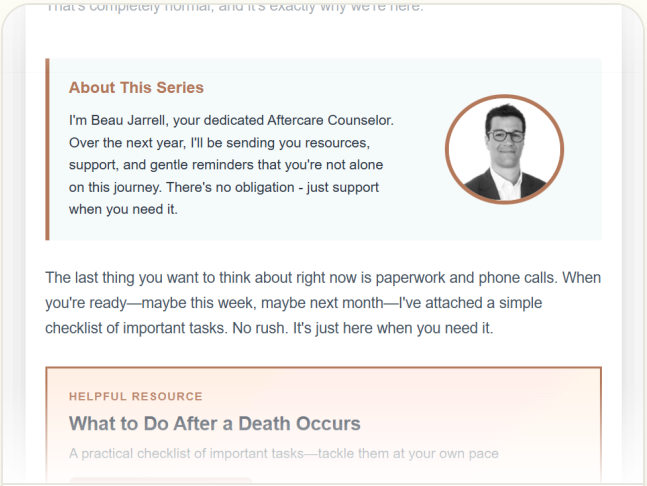
DAYS 120–365

Here When Ready

Reflective guides for the later stretch, and a warm door that never closes. By now the counselor is a familiar name and face the family trusts.

See the actual emails

Real messages from the series — shown here exactly as they'd arrive from **Jarrell Funeral Home**, signed by counselor **Beau Jarrell**. Tap any card to open the full letter and scroll through it.

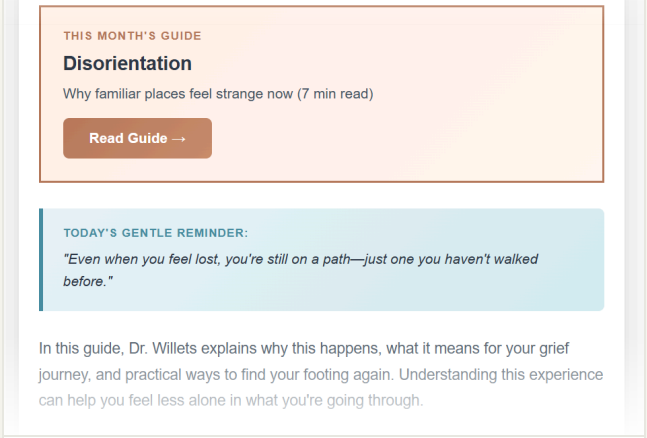


THE FIRST DAYS

The introduction

A personal hello from the counselor, a gentle "what to do now" checklist, and crisis resources up front.

Open full email →

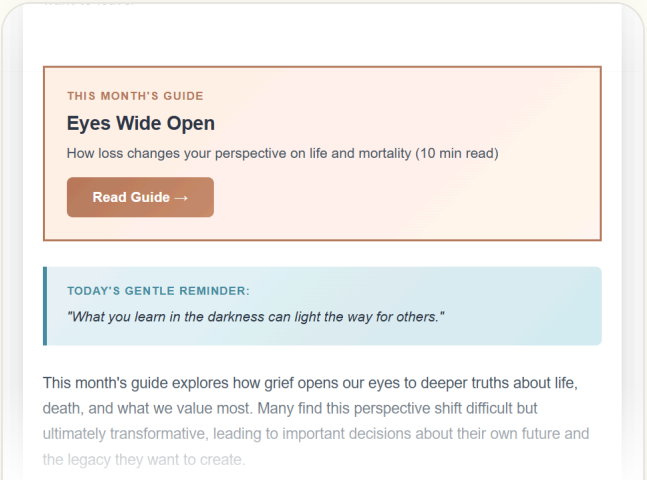


MID-JOURNEY

Disorientation

A grief guide for when familiar places suddenly feel strange — plus a gentle "is this helping?" check-in.

Open full email →



LATER IN THE JOURNEY

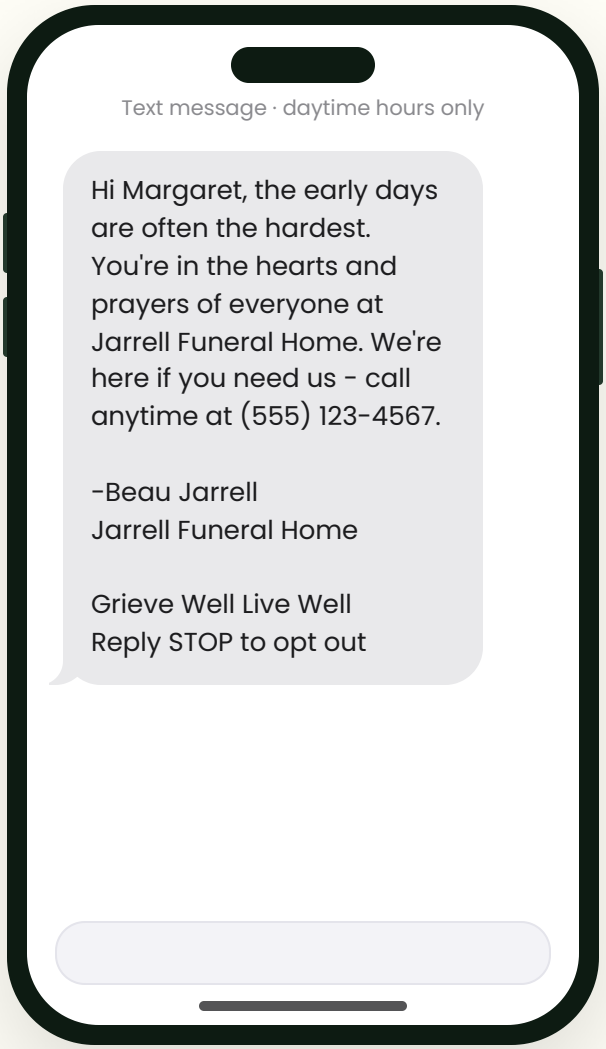
Eyes Wide Open

A reflective guide — and the first gentle, no-pressure mention that some families begin to think ahead.

Open full email →

Five short text messages across the year

Short notes signed by the same counselor, so the name and face stay consistent across both channels. They go only to families with a mobile number and consent on file, and only inside daytime hours.



The first days
Initial comfort, exactly as a family receives it.

MID-JOURNEY

A check-in

A short note acknowledging that this stretch often feels the loneliest, and a reminder that someone is there.

LATER IN THE JOURNEY

Thinking ahead

The one message in the year that mentions planning. Never in the first two months, gentle when it comes, and entirely on the family's timeline.

- ✓ **Paired with the letters.** A text lands the same day as its email rather than arriving as a separate interruption, and there are long stretches with neither.
- ✓ **Consent required, every time.** Only families with a mobile number and consent on file receive any text at all.
- ✓ **Daytime hours only.** Every send is held to a daytime window, so nothing arrives at night.
- ✓ **STOP always works.** Reply STOP to any text and the texts end immediately.
- ✓ **Your brand on every one.** Your firm name and the program name sign off each message, alongside your counselor.

The standards behind every send

The safeguards are the part most people never think to ask about, so we lead with them.

- ✓ **Support first, always.** The first two months are 100% grief support — no planning content of any kind.
- ✓ **Crisis resources in the very first email.** 988, Crisis Text Line and SAMHSA reach every family in the opening message.
- ✓ **Easy exits.** One-click unsubscribe on every email. Reply STOP to any text and the texts end immediately.
- ✓ **Texts only with consent.** Only to families with a mobile number and consent on file, and only during daytime hours.
- ✓ **Never nagging.** Feedback is asked at most twice, and a single response stops all reminders instantly.
- ✓ **A real person behind it.** Every reply, appointment, and call routes to the family's named counselor — with your team notified to follow up.

How planning enters, and how it doesn't

No planning content appears for the first two months. When it does, it reads like a door left open, never a pitch: *"whenever, or if ever, you're ready… no pressure."* No prices, no urgency. Every message — even those — keeps the counselor's promise: *"No sales, no pressure — just someone who understands."*

Most often it's framed as a gift: many families, having walked this path, want to spare their own loved ones the same burden. Planning is offered as a final act of love — on the family's timeline, not yours.

Across the full year, planning appears in a small handful of messages and in exactly one text.

What you'll see

Two places: your Fintra hub, updated continuously, and your counselor's inbox the moment a family raises their hand.

- ✓ **Enrollments.** How many families are in each series, how many are active, and how many have opted out.
- ✓ **Where your leads come from.** Aftercare alongside your other sources, so you can see what the program is actually producing.
- ✓ **Your pipeline.** Every lead by status, from new through nurturing, funded and dormant.
- ✓ **Appointment requests.** Families who asked to talk.
- ✓ **By location and by counselor.** For firms with more than one of either.
- ✓ **Growth over time.** Leads created week over week and month over month.

And in your inbox: the moment a family requests an appointment or leaves feedback, the counselor assigned to them gets an email with the family's name,

what they asked for, and which of your locations they belong to. Feedback can route to a separate address if you would rather it reached your team first.

The details, when you want them

Everything else about how the program runs — expand only what you're curious about.

- **How feedback is handled, and what never goes public** ›
- **Enrollment takes about ten seconds** ›
- **Choose your configuration** ›

A program, not a mail-merge

Grieve Well Live Well is managed as a single program, not a set of templates handed over and left alone. Content and timing are refined continuously against real engagement across every funeral home we serve, which is why what a family receives a year from now will be better than what they receive today.

Where the line sits

That works because the division of responsibility is clear, so we would rather state it plainly than leave it implied.

Yours to approve. Whether you are enrolled and in which configuration, your counselor's name, photo and contact details, your brand and firm details, the tone standards and the safeguards above, and where planning content sits in the year.

Ours to run. The wording of each message, sequencing and timing inside the published shape, ongoing refinement against engagement data, and which variations run and when.

Anything that would change the program's structure, or its posture on planning, comes to you before it moves.

We are often asked for the full library of messages, and we don't circulate it. That is less about protecting the writing than protecting your results: this copy is tuned against what actually works across dozens of funeral homes, and what we have watched happen when it gets rewritten locally is that the changes feel right and the numbers quietly get worse, with nobody ever connecting the two. So the writing stays on our side, and the standards stay on yours.