

OBJECTEV

CLIENT SUCCESS STORY

Estate Planning Essentials: What Every Employee Should Know

How one company gave 45 employees a life-changing financial resource in a single afternoon.

Your Experts. Next Door.

AT A GLANCE

The Numbers That Tell the Story

150

Total Employees at Company

45

Attended the Presentation

30%

Participation Rate — All Voluntary

THE COMPANY

A Growing Team That Needed More Than a Benefits Brochure

A company with 150 employees had a problem most HR leaders know well: employees had questions about their financial futures specifically around wills, trusts, and estate planning but nowhere to turn. Generic benefits packages don't cover it. Google searches feel overwhelming. And asking a colleague? Not exactly reassuring.

The Head of HR wanted something better. She wanted her team to walk away actually informed not handed another PDF.

COMPANY PROFILE

Industry: Multiple Sectors
Size: 150 Employees
Objectev Plan: Medium Team Subscription

SESSION DETAILS

Topic: Estate Planning Essentials
Format: In-Person Group Presentation
Expert: Ramona Petersen, Estate Planning Atty.
Attendance: 45 Employees (Voluntary)

THE CHALLENGE

Estate Planning Is Personal and Often Ignored - Until It's Too Late

Estate planning is one of those topics employees know they should address but rarely do. The reasons are predictable:

- It feels complicated and inaccessible without a professional guide.
- Traditional financial wellness programs skim the surface covering 401(k)s and HSAs while skipping estate essentials like wills, beneficiary designations, and powers of attorney.
- Finding a trusted local attorney one without a sales agenda is harder than it sounds.

The result? A workforce with significant blind spots around one of the most important financial decisions of their lives. This isn't just a personal problem, it's a retention and engagement issue. Employees who feel their company invests in their whole life tend to stay longer and perform better.

THE OBJECTEV SOLUTION

The Right Expert. Right Here. No Sales Pitch.

Through the Objectev marketplace, the HR team was matched with Ramona Petersen, an estate planning attorney selected from Objectev's highly curated list of subject matter experts. Ramona was booked directly through the platform to deliver an on-site group presentation:

"Estate Planning Essentials: What Every Employee Should Know"

This wasn't a sales event. Objectev's platform rules are clear: zero selling, zero pitching. Ramona's job was simple; educate, inform, and empower.

The session covered the essentials every adult needs to understand:

- What a will is, why it matters, and the most common mistakes people make without one
- How living trusts work and when they make sense
- The importance of durable powers of attorney and healthcare directives
- Beneficiary designation - the overlooked detail that can override your will
- How to take a confident first step without feeling overwhelmed or oversold

“Our staff loved having Ramona on site! Our employees enjoyed Ramona’s presentation style. We had great attendance and employees were able to walk away well-informed about the essentials of Estate Planning!”

Head of HR, Client Company

THE RESULTS

What a Single Presentation Can Do

The impact was immediate and measurable in the ways that matter most to HR leaders:

Employee Engagement	45 employees showed up voluntarily - because the topic mattered to their real lives.
Practical Value	Every attendee left with actionable knowledge about wills, trusts, and beneficiary designations - not another brochure.
Expert Quality	Ramona Petersen’s presentation style resonated deeply. Real expertise, genuine warmth - zero sales pressure.
HR Team Relief	Objectev handled expert sourcing, vetting, and booking. The HR lead just showed up to a great session.

WHY IT WORKED

The Objectev Difference

This outcome wasn’t an accident. It’s what happens when the right expert meets the right audience with no friction in between. Here’s what made this session work:

- Highly curated expert - Ramona Petersen wasn’t pulled from a generic speaker directory. She was selected from Objectev’s highly curated list of subject matter experts, with real credentials and a proven ability to make complex topics accessible.
- Zero selling! Objectev’s platform rule. Every session is 100% educational. Employees can trust what they’re hearing.
- Local connection - “Your Experts. Next Door.” isn’t just a tagline. Local experts understand community context and show up with genuine investment.
- HR didn’t have to build this from scratch - the platform handled sourcing, vetting, and booking. The HR team’s job was to announce it and show up.

FREQUENTLY ASKED QUESTIONS

What HR Leaders Are Asking About Employee Education Benefits

These are the questions HR teams ask us most and what Objectev helps answer.

Can my company offer estate planning education as an employee benefit?

Yes and it's easier than you think. Through Objectev, HR teams can book a vetted local estate planning attorney to deliver an on-site or virtual group presentation. No legal liability for the employer. No sales pressure for employees. Just real, actionable education.

What topics does an estate planning presentation for employees cover?

A comprehensive session typically covers: the basics of wills and living trusts, durable powers of attorney, healthcare directives, beneficiary designation strategies, and how to take a confident first step. The goal is informed employees not overwhelmed ones.

How does Objectev vet its expert speakers?

Every expert on Objectev's platform is reviewed for credentials, communication ability, and strict alignment with our no-sales presentation standard. Only educators make it through not salespeople wearing an expert's badge.

What is the ROI of offering estate planning education to employees?

According to Gallup, disengaged employees cost U.S. businesses \$550 billion per year in lost productivity. Benefits that address employees' real-life concerns - beyond the standard package - are directly linked to higher engagement, lower voluntary turnover, and stronger retention. One session. Real impact.

How long does it take to book an expert through Objectev?

Most bookings only take minutes. Once confirmed by the speaker it happens within 3 - 4 weeks. An intentional signal of quality. You're not getting whoever is available. You're getting the right expert for your team.

Ready to bring this to your team?

Your next great session is just weeks away. Let's find your expert.

→ **Book a Demo at objectev.com**

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