



FOR TRUSTED PROFESSIONALS AND COMMUNITY PARTNERS

Widowhood Resource Partner Kit

A calm educational beginning for a woman carrying new financial responsibility after the loss of a spouse.

Share a place where she can learn in plain English, save her questions privately, and choose what comes next at her own pace.



BEGIN HERE

Your financial life belongs to you.

General education first. A conversation only when she requests one.



FOR THE WOMAN YOU SERVE

A thoughtful place to begin

When a woman loses her spouse, financial responsibility can arrive all at once, even when understanding does not.

She may be looking at accounts she did not manage, documents she has never seen, property decisions, tax questions, insurance proceeds, beneficiary forms, and advice from several professionals. She may not need another presentation. She may need a quiet way to see what is in front of her and decide which questions belong to whom.

Solid Ground Reserve is an education-first resource created for women navigating widowhood and other major financial life transitions. Here, she can learn in plain English, ask questions privately, and save what matters in her Living Book.

It is designed to complement the guidance of the professionals already around her by helping her become more informed, organized, and prepared for those conversations. When she knows what to ask, the conversation changes.

For you, it is a thoughtful educational tool to share when a woman needs somewhere calm to begin. For her, it is a private way to build understanding and participate more fully in the decisions shaping her financial life. She controls the pace and requests a conversation only if she wants one.

A good fit for a woman who is asking

- Where do I begin?
- How do I organize what I know?
- Which decisions may need attention, and which may be able to wait?
- Who can help me answer each kind of question?
- How does diversification fit into my broader financial life?

How to share it

Offer it as an optional educational resource. The simplest introduction is: "This may give you a calm place to gather your questions before your next professional conversation."



PRINTABLE WORKSHEET

What do I have

This is a starting inventory, not a demand to find everything today. Check what you recognize. Leave the rest for another time.

People and access

☐	Names and contact details for the attorney, CPA, financial adviser, insurance professional, trustee, or executor
☐	A list of online accounts, paper statements, mail, and recurring bills I know about
☐	Information about who currently has authority or access, without writing passwords here

Core documents

☐	Death certificates and estate or trust documents
☐	Will, trust, power-of-attorney records, and beneficiary information
☐	Recent tax returns and notices
☐	Marriage, property, business, or ownership records that may matter

Financial accounts

☐	Checking, savings, money market, and certificates of deposit
☐	Retirement accounts, pensions, annuities, and Social Security correspondence
☐	Brokerage accounts, individual investments, and employer plans
☐	Life insurance policies and claims information

Private note

Do not write Social Security numbers, account numbers, passwords, security codes, or transfer instructions on this worksheet.



PRINTABLE WORKSHEET

What do I have continued

You are creating a view of the whole financial life, not deciding what to do with it.

Property and obligations

☐	Primary home, additional property, mortgages, leases, and property tax records
☐	Business interests, partnership interests, or proceeds from a recent sale
☐	Vehicles, valuable personal property, storage, and safe-deposit information
☐	Credit cards, loans, household expenses, subscriptions, and recurring payments

Questions and timing

☐	Which items have a confirmed deadline?
☐	Which decisions may be able to wait until I have more information?
☐	Which questions belong to an attorney, CPA, financial professional, insurer, trustee, or account custodian?
☐	What would I like explained in plain English before I sign or change anything?

The three things I want to understand first

1. _____
2. _____
3. _____

One person I may want beside me in the next conversation



SAMPLE LIVING BOOK PAGE

The people around my financial life

A Living Book keeps her questions and observations together. It does not evaluate her finances or create a financial plan.

PERSON OR ORGANIZATION	WHAT THEY HANDLE	WHAT I WANT TO ASK

A note I want to remember



SAMPLE LIVING BOOK PAGE

Questions before decisions

A question does not commit her to an action. It gives her something specific to carry into the right professional conversation.

What feels unclear

A term, document, account, request, deadline, or choice I want explained

Who may be qualified to answer

Attorney, CPA, financial professional, insurance professional, trustee, custodian, or another person

What I heard

The explanation I received, in my own words

What I want to ask next

A follow-up question or something I want independently confirmed



PARTNER SHARING LANGUAGE

A suggested email to your client

Use this as written or adapt it so it sounds like you and reflects your relationship with her.

Subject

A private resource for organizing your financial questions

Email

Hi [First name],

I wanted to share a resource that may give you a calm, private place to gather the financial questions in front of you.

Solid Ground Reserve was created for women navigating widowhood and other major financial life transitions. You can learn in plain English, ask questions privately, and save what matters in your Living Book.

The resource is designed to complement the guidance of the professionals already around you by helping you become more informed, organized, and prepared for those conversations.

You can explore it at your own pace. Using the resource does not require you to request advice, speak with a salesperson, or make a financial decision.

Begin here: <https://solidgroundreserve.com/widowhood/>

I am sharing it as an optional educational resource. If it helps you identify questions for me or another professional, please bring them to our next conversation.

Warmly,

[Your name]

Short version for a note or text

This may give you a calm place to organize what you know and save questions before your next professional conversation: solidgroundreserve.com/widowhood/



OUR EDUCATIONAL ROLE

Clear boundaries protect her choices

Solid Ground Reserve is designed to support informed questions and permission-based next steps.

What Solid Ground Reserve provides

General educational information, private self-directed tools, life-transition guides, and educational material about precious metals. If a woman asks, Solid Ground Reserve can arrange a permission-based introduction to a senior account executive.

What Solid Ground Reserve does not provide

Solid Ground Reserve does not provide individualized legal, tax, financial-planning, or investment advice. Rebecca does not act as a financial adviser, create financial plans, evaluate suitability, or recommend investments, securities, account rollovers, transactions, or allocation percentages.

Compensation disclosure

Solid Ground Reserve may receive compensation from a precious-metals company if a woman requests an introduction or completes a transaction. Every educational resource may be used without requesting an introduction or making a purchase.

For personal decisions

A woman should use the appropriate licensed or otherwise qualified professional to evaluate her circumstances before acting. Professionals sharing this kit should continue to work within their own qualifications, duties, and disclosure requirements.

Share a calm beginning

solidgroundreserve.com/widowhood/
hello@solidgroundreserve.com

