

Trust & Will Receives SOC 2 Compliance Attestation Report



Leading digital estate planning platform achieves significant milestone to solidify its ongoing commitment to customers and their data security.

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Trust & Will, the leading digital estate planning platform in the U.S, is proud to announce that it has received a clean SOC 2 Type I attestation report. To date, Trust & Will is the only online estate planning company to carry SOC 2 certification. The attestation report affirms that Trust & Will's information security practices, policies, procedures, and operations meet the rigorous SOC 2 Trust Service Criteria for security.

Trust & Will is now the only digital estate planning company to carry SOC 2 compliance. Obtaining SOC 2 ensures the highest standards for customer data and security. This independent assessment of internal security controls validates its dedication and adherence to the highest standards for security, confidentiality, and availability. Developed by the Association of International Certified Professional Accountants (AICPA), SOC 2 is an extensive auditing procedure that ensures a company is handling customer data securely and in a manner that protects the organization as well as the privacy of its customers. SOC 2 is designed specifically for service providers storing customer data in the cloud.

"We are delighted to receive a clean SOC 2 Type I attestation report as it substantiates our ongoing commitment to securing our customers' data," said **Eric Urhausen**, Head of Engineering at Trust & Will. "We continuously prioritize the improvement of our security posture, which helps increase trust in our product and in the digital estate planning industry as a whole."

Trust & Will uses **Drata's** automated platform to continuously monitor its internal security controls against the highest possible standards. With Drata, Trust & Will has real-time visibility across the organization to ensure the end-to-end security and compliance posture of systems.

"Achieving SOC 2 Type I compliance is a significant milestone for the fast-growing Trust & Will team," said **Adam Markowitz**, Co-Founder and CEO of Drata. "Paired with Drata's continuous automated monitoring of its controls, Trust & Will further elevates its security posture and sets the stage for its ongoing compliance journey. We applaud the company's approach and leadership, and truly value our partnership."

ABOUT TRUST & WILL

Trust & Will is a modern approach to digital estate planning, offering legally valid documents designed and approved by estate planning attorneys to adhere to individual state guidelines. Our mission is to provide families with a better way to plan for the future. Since 2017, more than 250,000 Trust & Will members have created an online estate plan to set up their family legacy. We make estate planning simple, affordable, and accessible by providing a secure way to set up a plan online in minutes, using bank-level encryption that protects customer data and complies with the highest security standards, including SOC2. Trust & Will is the official estate planning benefit provider for AARP members and is a proud partner of several leading financial institutions, including Northwestern Mutual and Haven Life. To learn more, visit www.trustandwill.com.

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