



READY SET... ESTATE PLAN

Organizing your estate now will help your family and loved ones prepare, cope and transition when the time comes and ensure your wishes are fulfilled. This checklist will help you prepare and address legal, financial and health-related documents that will affect your estate plan. And the FidSafe Share After Death feature allows your important documents to be accessed by a trusted designee when you pass. Help make a difficult time easier by preparing your FidSafe® files now. See reverse for simple instructions to sign up today.

01 LEGAL DOCUMENTS

For your loved ones to be ready in the event of your death or an emergency.

Last Will and Testament

Durable Power of Attorney

Living Wills

Trust Documents

Transfer on Death Registrations and Beneficiary Designations

Business Continuation Agreements

Marriage License

Instructions for Disbursement of Property and Belongings
(Not Covered in Will)

03 HOME

To organize home, auto and personal documents and deeds.

House and Land Deeds / Mortgage Agreements

Household Possessions Inventory List

Vehicle Titles

Insurance Appraisals

Contact Information for Trusted Advisors

Charitable Interested/Wishes–Asset/Property Bequests
and “In Memory of” Donations

Key People and Contact Information
(Lawyers, Accountants, Executor, etc.)

02 FINANCIAL

A complete list of all banking accounts, investments and personal heirlooms.

401k Statements and Account Information

IRAs

Safe Deposit Boxes

Social Security Benefits

Pensions

Savings Bonds / Annuities

Life Insurance

Trusts

Inventory and Location of Precious Metals / Collectable Coins

Loans

04 HEALTHCARE

Documents and plans for all healthcare needs.

Life Insurance Policies

Healthcare Proxy and HIPAA Authorization Form

End-of-Life Care Plans

Phone Numbers of Medical Contacts

Care Plans and Special Instructions

Pet Care Instructions



SIGN-UP

FidSafe® is quick, easy and free to use. It's your secure online solution that ensures the critical files you need are available to you and your family whenever and wherever you need them. To get started, follow our step-by-step instructions below. If you need support, email us at support@fidsafe.com. Get started securing your critical documents today.

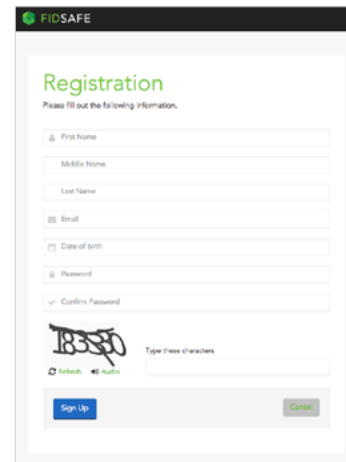
01 REGISTRATION

Fill out the registration form to start the process. With a few simple steps, you can begin to load your documents.

Select User Name

Create Password

Verify Your Email Address



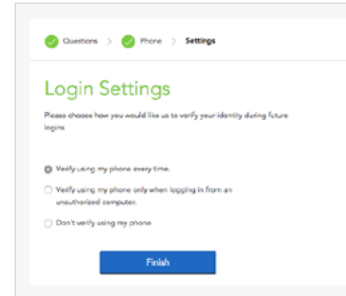
02 LOGIN AND CONFIRM

When you're ready to login, simply enter your username and password. We ask you to answer security questions and verify a phone number. All part of FidSafe's secure, two-factor authentication.

Login

Answer Security Questions

Enter and Verify a Phone Number



03 START ORGANIZING

Congratulations, you've created your FidSafe account. Now you can begin organizing your important documents and sharing files with family and trusted advisors.

Load Your First Document

Add Contacts

Utilize Our Checklists

