



READY SET... ELDER PLAN

Preparation for elder care is a critical step in maintaining a comfortable lifestyle for everyone involved. FidSafe® helps families start this sensitive discussion and organize paperwork to ensure that everyone's needs are met. FidSafe is a free, secure digital space where documents can be stored and shared with loved ones and advisors as needed. See reverse for simple instructions to sign up today.

01 LEGACY PLANNING

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

Last Will and Testament

Durable Power of Attorney

End-of-Life Plans

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

Letters to Loved Ones / Memoir

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

Charitable Interests / Wishes—Asset / Property Bequests and "In Memory of" Donations

03 HEALTHCARE AND INSURANCE

To ensure your medical needs are taken care of and information is easily accessible.

Document Care Instructions (Preferred Care in the Event of an Inability to Do so on Your Own)

Life Insurance Policies

Disability Policies

HIPAA Authorization and Healthcare Proxy Information

Medicare / Medicaid Policy

Prescriptions and Dosage

Do-Not-Resuscitate Order

Medical Orders for Life-Sustaining Treatment Documents

Discharge Summary From Recent Hospital Stays

Care Plans and Special Instructions

Pet Care Instructions

02 FINANCIAL

A complete list of credit cards, bank accounts, investment accounts and legal agreements.

401k / Pension Summaries

Budget

Financial Account Summaries

Social Security Benefits

Trust Documents

Credit Card(s) / Summary of Financial Obligations

Tax Filings and History

Home Title(s) and/or Mortgages(s)

Rental / Landlord Agreements

Charitable Giving Accounts and Donation Plans

Alimony Agreements

04 CONTACTS AND ACCESS

Details on all key people and account login information.

Key People Contact Information

Online Account Logins

Location of Paper Documents

Household Possessions Inventory List
(e.g., Furniture, Art, Jewelry)

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.

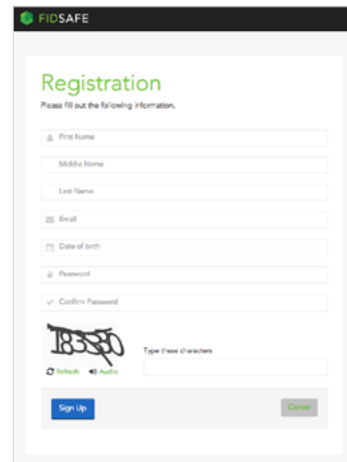
01 REGISTRATION

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



The registration form is titled "Registration" and asks the user to fill out the following information: First Name, Middle Name, Last Name, Email, Date of birth, Password, and Confirm Password. There is a captcha image and a "Type these characters" field. At the bottom, there are "Sign Up" and "Cancel" buttons.

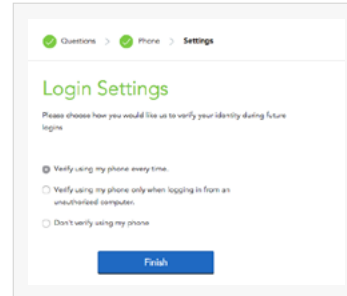
02 LOGIN AND CONFIRM

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



The "Login Settings" form shows options for how to verify identity during future logins. The options are: "Verify using my phone every time" (selected), "Verify using my phone only when logging in from an unauthorized computer", and "Don't verify using my phone". There is a "Finish" button at the bottom.

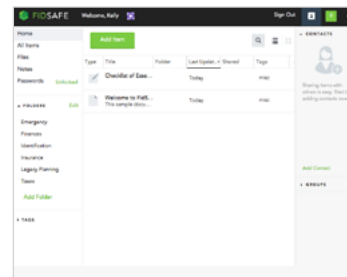
03 START ORGANIZING

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



The home dashboard shows a sidebar with "All Items" and "Add Item" buttons. The main area displays a table with columns for "Type", "Title", "Last Update", "Shared", and "Tags". There are also sections for "Emergency", "Insurance", "Legacy Planning", and "Tools".