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)

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

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.)

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

ARE YOUR DOCUMENTS READY? GREAT!

LET'S GET STARTED > fidsafe.com

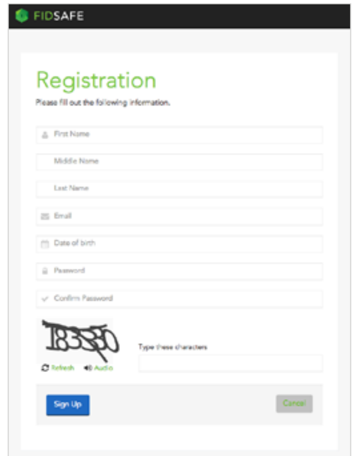
SIGN-UP

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.

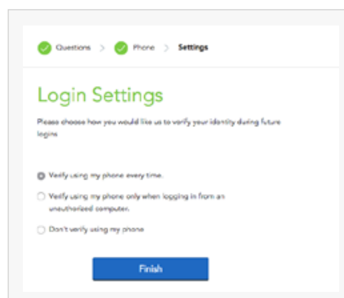
- [ ] Select User Name
- [ ] Create Password
- [ ] Verify Your Email Address



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