



READY SET... CAREER PLAN

Whether you already have a job or are planning for a new one, you want to be as prepared and organized as possible so you can focus on making a big impact. One of the best things you can do is have the documents you need for career management securely stored and accessible in FidSafe®. From there, you can easily reference or share documents with others, such as your employer(s), colleagues, clients or trusted advisors.

01 EMPLOYMENT RECORDS

For a comprehensive list of job-related agreements and tax filing documents.

Employment Contract

Compensation Agreement

W2s and Rollover Tax Documents (1099R, 5498, etc.)

W-4 Employee's Withholding Allowance Certificate

Group Insurance Policy

Stock Options

03 JOB CHANGE AND NETWORKING MATERIALS

Inclusive of past and future employment resources.

Application to Current and Former Employers

Cover Letters

Reference Letters and Agreements

Contact Information for Service Professionals
(Recruiting Firms, Executive Coaches and Others)

Passwords to Career Sites

02 PROFESSIONAL AND EDUCATIONAL HISTORY

A complete portfolio of your education, accomplishments, past work and résumé.

Résumé

Professional Awards and Certifications

Professional Licenses

Published Articles

Past Presentations and Performance Assets
(NOTE: Be sensitive to your company's information security policy.)

Diplomas and Transcripts

Essays and Dissertations

References

Headshot Photographs

Biography

04 FINANCIAL

Records of existing financial statements and accounts.

401k / 403b or Other Qualified Plans Summary of
Benefit Statements

401k or IRA Beneficiary Forms

401k or IRA Statements

Fund Diversification Summaries

Corporate Action Letters

Pension Agreements

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.

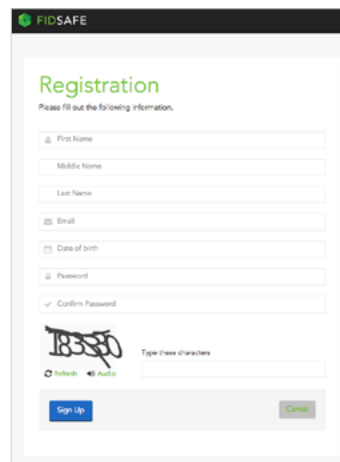
01 REGISTRATION

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 includes fields for First Name, Middle Name, Last Name, Email, Date of birth, Password, and Confirm Password. It also features a CAPTCHA image and a 'Sign Up' button.

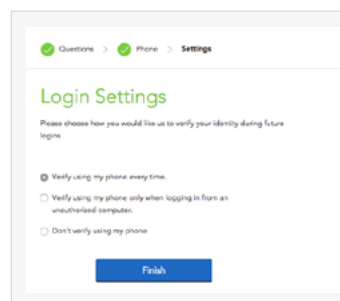
02 LOGIN AND CONFIRM

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 allows users to choose how they want to verify their identity during future logins. Options include 'Verify using my phone every time', 'Verify using my phone only when logging in from an unauthorized computer', and 'Don't verify using my phone'. A 'Finish' button is at the bottom.

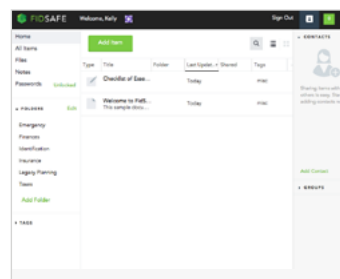
03 START ORGANIZING

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 navigation options like Files, Passwords, Emergency, and more. The main area displays a 'Welcome, Kelly' message and a 'Share this with...' section.