

READY SET... HOME BUYING

Buying your first or next home is an exciting life moment, but let's admit it, sometimes the process can be a little overwhelming. Whether you're getting preapproved for a mortgage or closing on the house of your dreams, you will need to have all of your critical documents organized and accessible. FidSafe® provides you with a solution that securely centralizes your documents in one place that you can conveniently access through your desktop or mobile device. Additionally, you can easily share documents with key contacts, including real estate agents, mortgage brokers, or financial advisors.

01 PRE-APPROVAL

Records of identification, financial, tax, and employment documentation.

Valid Driver's License or Passport

Current Pay Stubs From Past Two Pay Periods

Tax Returns From Past Two Years (Note: IRS Form 4506-T [Request for Transcript of Tax Return] Can Be Submitted to the IRS in order to Collect Return Information Free of Charge.)

W-2s From Past Two Years

Bank Statements From Past Three Months

Retirement [401(k), IRA] Account Statements From Past Three Months

Nonretirement Account Statements From Past Three Months

Credit Report

Monthly Debt Obligations
(Credit Cards, Utilities, Services, Loans)

Gifting Letters

Explanation of Employment Gaps

02 OFFER & SALE

Official paperwork to secure the agreement of the Offer & Sale.

Pre-approval Letter

Sales Contract

Addendums

Photographs to Document House Conditions

03 THE CLOSING

Complete file of all signed documents during the transaction.

Completed Sales Contract

Title

Title Insurance

Proof of Inspection

Promissory Note

HUD-1 Statement

Homeowner's Insurance

Copy of Escrow Check

04 POST-CLOSING

To organize any home mortgage and maintenance information.

Mortgage Information

Closing Statement

Deed

Insurance

Home Repair Contact List (Contractors, Plumbers, Electricians)

Utilities (Gas, Oil, Electric)

Home Services (Landscaping, Snow Removal)

Warranties for Appliances, Tools, and Machinery

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.

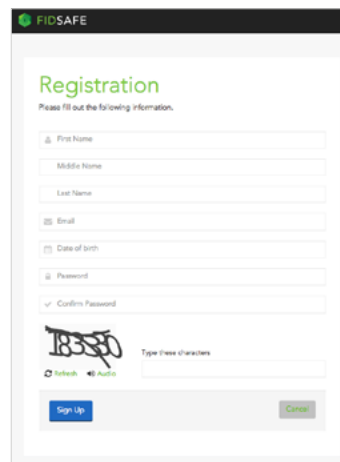
01 REGISTRATION

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 also a CAPTCHA image and a "Type these characters" field. At the bottom, there are "Sign Up" and "Cancel" buttons.

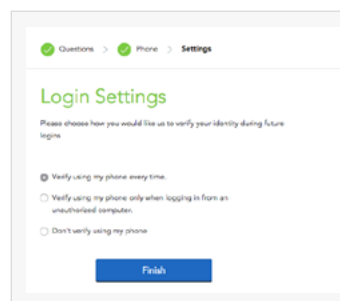
02 LOG IN AND CONFIRM

When you're ready to log in, 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.

Log In

Answer Security Questions

Enter and Verify a Phone Number



The login settings form is titled "Login Settings" and asks the user to choose how they would like to verify their identity during future logins. There are three options: "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". At the bottom, there is a "Finish" button.

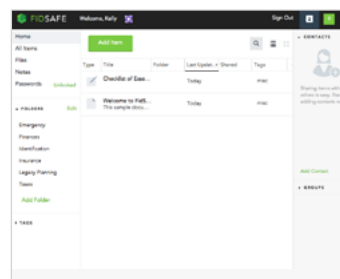
03 START ORGANIZING

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".