



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.

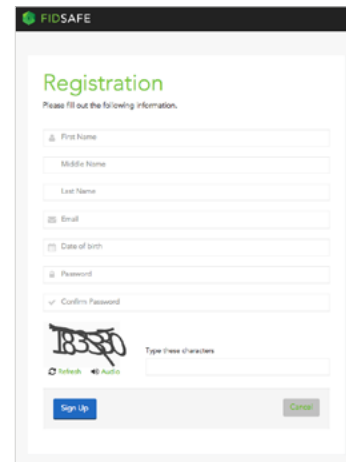
01 REGISTRATION

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



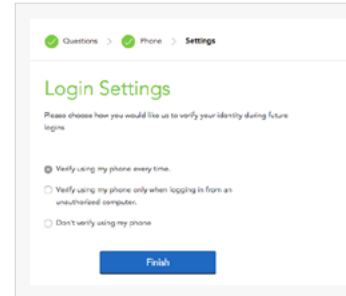
02 LOGIN AND CONFIRM

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

