



# 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](mailto: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.

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Select User Name

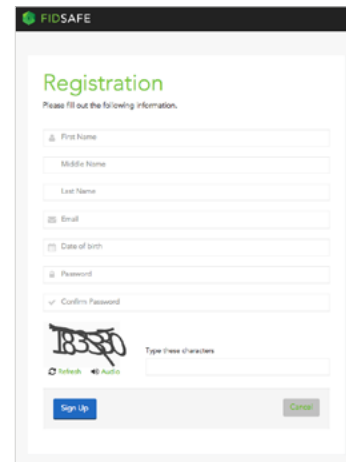
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Create Password

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Verify Your Email Address

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## 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.

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Login

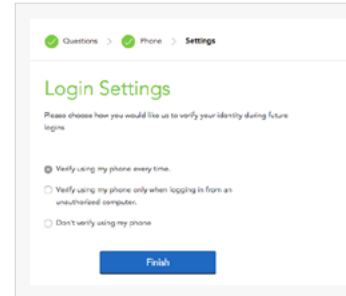
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Answer Security Questions

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Enter and Verify a Phone Number

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## 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.

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Load Your First Document

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Add Contacts

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Utilize Our Checklists

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