



# 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.

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- Employment Contract

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  - Compensation Agreement

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

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  - W-4 Employee's Withholding Allowance Certificate

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  - Group Insurance Policy

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  - Stock Options

## 03 JOB CHANGE AND NETWORKING MATERIALS

Inclusive of past and future employment resources.

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- Application to Current and Former Employers

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  - Cover Letters

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  - Reference Letters and Agreements

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

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  - Passwords to Career Sites

## 02 PROFESSIONAL AND EDUCATIONAL HISTORY

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

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- Résumé

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  - Professional Awards and Certifications

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  - Professional Licenses

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  - Published Articles

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

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  - Diplomas and Transcripts

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  - Essays and Dissertations

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  - References

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  - Headshot Photographs

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  - Biography

## 04 FINANCIAL

Records of existing financial statements and accounts.

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

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  - 401k or IRA Beneficiary Forms

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  - 401k or IRA Statements

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  - Fund Diversification Summaries

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  - Corporate Action Letters

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  - 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](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

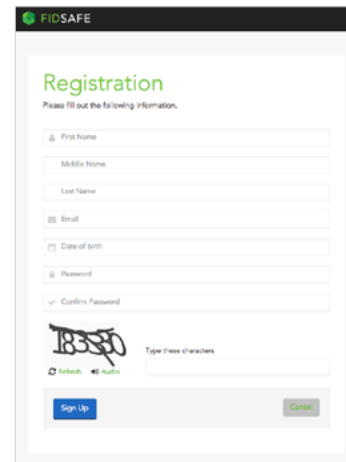
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Create Password

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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

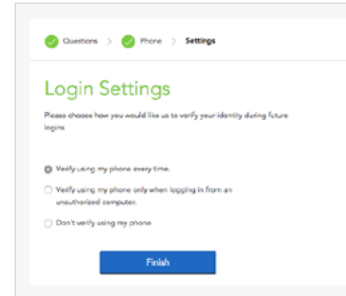
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Answer Security Questions

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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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