



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. Get started securing your critical documents today.

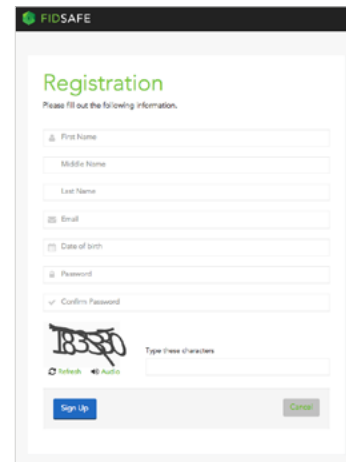
01 REGISTRATION

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



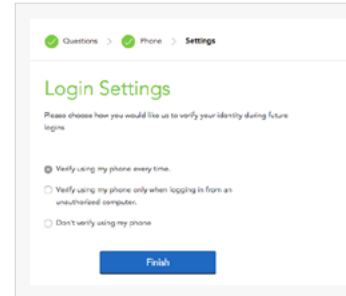
02 LOGIN AND CONFIRM

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

