



READY SET... RETIREMENT PLAN

Preparing for retirement is an exciting time—don't let paperwork get in the way. To be prepared, one of the best things you can do is have the documents you need securely stored and accessible in FidSafe®. From there, you can easily share documents with family members and trusted advisors, and access them anywhere you have internet access. See reverse for simple instructions to sign up for FidSafe today.

01 INVESTMENTS AND TAX

To prepare for lifetime income and budget planning.

 Financial Accounts (Summary List and Statements)

 Financial Plans and Budgets

 Tax Records

 W2 Forms

 Annuity Contracts

 Social Security Benefit Application

 Pension Plan Info

 Credit Report

03 HOME AND TRAVEL

To prepare for housing and/or mortgage changes as well as adventure.

 House and Land Deeds / Mortgage Agreements

 Homeowner's Insurance

 Household Possessions Inventory List

 Passport Copy

 Online Account Logins

 IDs (Birth Certificate, SS Card, Citizenship Documents)

 Copies of Health Insurance Card(s)

 Travel Insurance Records

02 HEALTHCARE

To ensure your medical documents are at the ready.

 Medicare Application

 Medicare Supplemental Policies

 Healthcare Proxy and HIPAA Authorization Form

 Advanced Medical Directive

 Benefit Summaries

 Long-Term Care Policies

 Phone Numbers of Medical Contacts
(Insurance, Doctors, Pharmacies, etc.)

 Copies of Active Prescriptions

04 LEGACY PLANNING

For your loved ones to be well-prepared in the event of your death or an emergency.

 Insurance Policies and Beneficiaries

 Last Will and Testament

 Trust Documents

 List of Key People

 Durable Power of Attorney

 Funeral and Burial Plans



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.

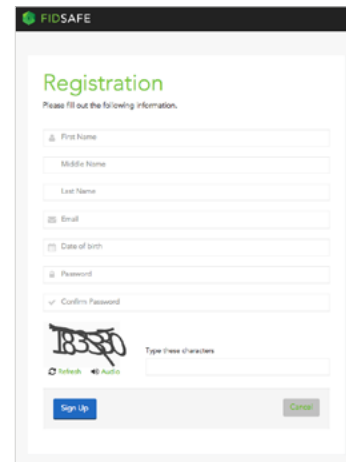
01 REGISTRATION

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



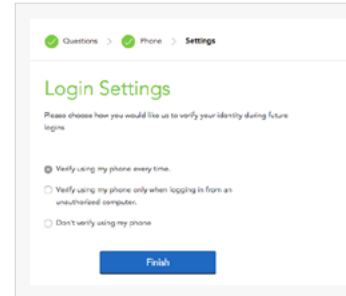
02 LOGIN AND CONFIRM

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

