



READY SET... HOME BUYING

Buying your first or next home is an exciting life moment, but let's admit it, sometimes the process can be a little overwhelming. Whether you're getting preapproved for a mortgage or closing on the house of your dreams, you will need to have all of your critical documents organized and accessible. FidSafe® provides you with a solution that securely centralizes your documents in one place that you can conveniently access through your desktop or mobile device. Additionally, you can easily share documents with key contacts, including real estate agents, mortgage brokers, or financial advisors.

01 PRE-APPROVAL

Records of identification, financial, tax, and employment documentation.

 Valid Driver's License or Passport

 Current Pay Stubs From Past Two Pay Periods

 Tax Returns From Past Two Years (Note: IRS Form 4506-T [Request for Transcript of Tax Return] Can Be Submitted to the IRS in order to Collect Return Information Free of Charge.)

 W-2s From Past Two Years

 Bank Statements From Past Three Months

 Retirement [401(k), IRA] Account Statements From Past Three Months

 Nonretirement Account Statements From Past Three Months

 Credit Report

 Monthly Debt Obligations
(Credit Cards, Utilities, Services, Loans)

 Gifting Letters

 Explanation of Employment Gaps

02 OFFER & SALE

Official paperwork to secure the agreement of the Offer & Sale.

 Pre-approval Letter

 Sales Contract

 Addendums

 Photographs to Document House Conditions

03 THE CLOSING

Complete file of all signed documents during the transaction.

 Completed Sales Contract

 Title

 Title Insurance

 Proof of Inspection

 Promissory Note

 HUD-1 Statement

 Homeowner's Insurance

 Copy of Escrow Check

04 POST-CLOSING

To organize any home mortgage and maintenance information.

 Mortgage Information

 Closing Statement

 Deed

 Insurance

 Home Repair Contact List (Contractors, Plumbers, Electricians)

 Utilities (Gas, Oil, Electric)

 Home Services (Landscaping, Snow Removal)

 Warranties for Appliances, Tools, and Machinery



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.

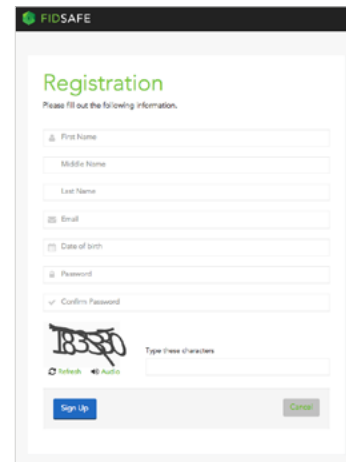
01 REGISTRATION

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



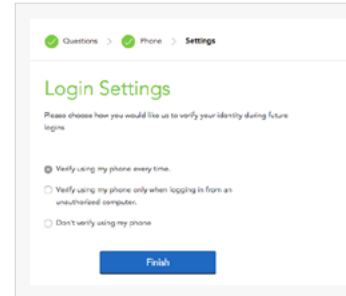
02 LOG IN AND CONFIRM

When you're ready to log in, 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.

 Log In

 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

