FIDSAFE

My Retirement Documents **Checklist**

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

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

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

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

ARE YOUR DOCUMENTS READY? GREAT!

LET'S GET STARTED > fidsafe.com

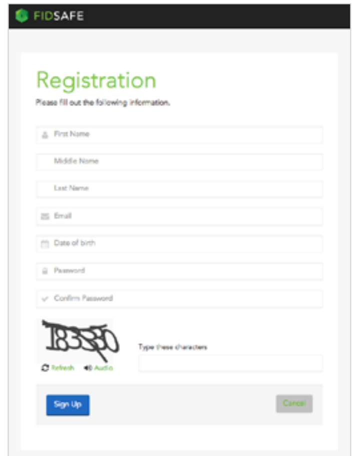
SIGN-UP

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.

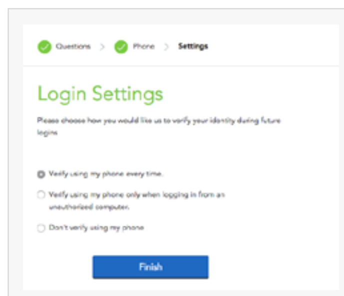
- [ ] Select User Name
- [ ] Create Password
- [ ] Verify Your Email Address



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