My Life and Wishes
GETTING STARTED GUIDE

Congratulations!

You've made the thoughtful decision to plan ahead and get organized for you and your loved ones. Not sure where to start? My Life and Wishes was created to make the process easy!

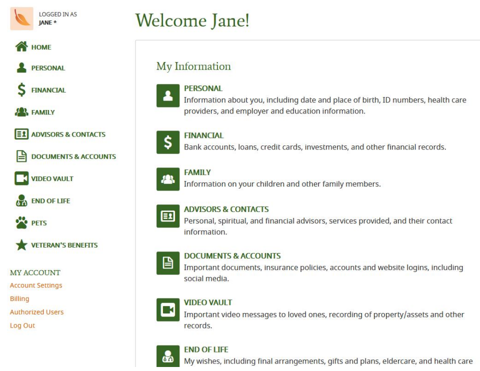
This short guide will help you get started. Also explore our planning center for more resources and planning information.

Need more help?

The My Life and Wishes support team is available from 8:00 am to 5:00 pm Central time.

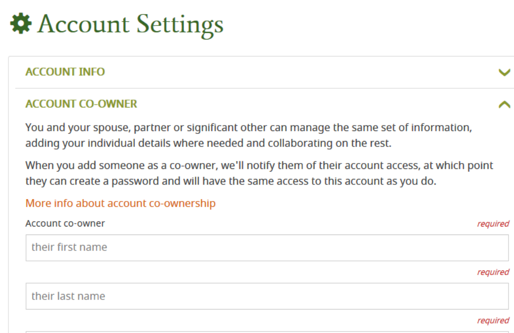
Toll-free: 844-369-4747
support@mylifeandwishes.com

My Life & Wishes®

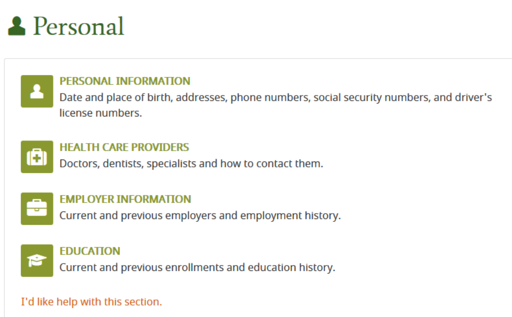


Step 1: Take a little time to explore the different sections within your My Life and Wishes account. This can help you to understand what kind of information you can store in your account, and provide direction as to what information you will need to gather.

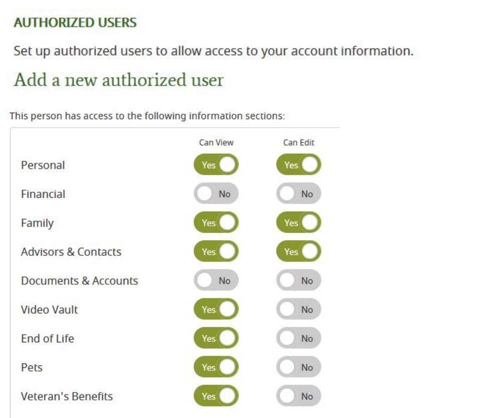
Additional help resources are available within each section of your site.



Step 2: Do you want to share your account with a spouse or partner? If you didn't invite an account co-owner initially, you can do so at any time. When you invite an account co-owner, your site will expand to accommodate information for two individuals, as well as joint information. Your co-owner has full access to the site, including viewing, adding, removing, and editing information.



Step 3: Start entering information. You may find it easier to work on one section at a time. For example, start with the personal section and enter the information you know. Go back and gather additional details and documents to upload later. It's easy to add and update information any time, and before you know it, you'll have a complete digital record of all the critical information your loved ones will need.



Step 4: You've put in the work to create this record, now make sure to set-up and invite your authorized users. You may invite as many authorized users as you like. You determine what sections of your account each one can see or edit. Common authorized users are adult children, siblings, a caregiver, or even a professional advisor - it's up to you.

Step 5: Keep your account up-to-date! Life changes. Schedule time for periodic updating to make sure your My Life and Wishes account is current. This way, in the event of an emergency, you will have access to your most up-to-date information. Saving time for you and your loved ones when the information is needed most.

Your life. Their future.