

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.

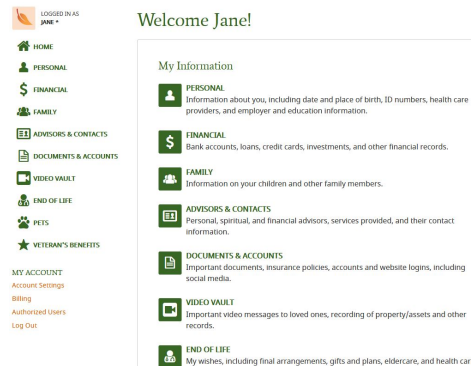


The screenshot shows the My Life and Wishes website interface. At the top, there's a navigation bar with links: HOME, PERSONAL, FINANCIAL, FAMILY, ADVISORS & CONTACTS, DOCUMENTS & ACCOUNTS, VIDEO VAULT, END OF LIFE, PETS, and VETERAN'S BENEFITS. Below this is a search bar and a 'Log In' button. The main content area is titled 'Planning Center' and features a large image of a tree. To the right, there's a 'Life Planning Checklist' section with a 'DOWNLOAD NOW' button. Below the checklist, there are several resource cards: 'End-of-Life Planning Resources', 'FINANCIAL', 'FUNERAL & MEMORIALS', 'HEALTH CARE DECISIONS', 'INSURANCE & LEGAL DOCUMENTS', and 'PERSONAL ASSETS'. Each card has a brief description and a 'Learn More About:' link.

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



The screenshot shows the 'Welcome Jane!' dashboard. On the left is a sidebar with navigation links: HOME, PERSONAL, FINANCIAL, FAMILY, ADVISORS & CONTACTS, DOCUMENTS & ACCOUNTS, VIDEO VAULT, END OF LIFE, PETS, and VETERAN'S BENEFITS. Below these are links for 'MY ACCOUNT', 'Account Settings', 'Billing', 'Authorized Users', and 'Log Out'. The main content area is titled 'My Information' and lists several sections: PERSONAL (Information about you, including date and place of birth, ID numbers, health care providers, and employer and education information), FINANCIAL (Bank accounts, loans, credit cards, investments, and other financial records), FAMILY (Information on your children and other family members), ADVISORS & CONTACTS (Personal, spiritual, and financial advisors, services provided, and their contact information), DOCUMENTS & ACCOUNTS (Important documents, insurance policies, accounts and website logins, including social media), VIDEO VAULT (Important video messages to loved ones, recording of property/assets and other records), and END OF LIFE (My wishes, including final arrangements, gifts and plans, eldercare, and health care).

Account Settings

ACCOUNT INFO

ACCOUNT CO-OWNER

You and your spouse, partner or significant other can manage the same set of information, adding your individual details where needed and collaborating on the rest.

When you add someone as a co-owner, we'll notify them of their account access, at which point they can create a password and will have the same access to this account as you do.

[More info about account co-ownership](#)

Account co-owner required

their first name required

their last name required

Personal

PERSONAL INFORMATION

Date and place of birth, addresses, phone numbers, social security numbers, and driver's license numbers.

HEALTH CARE PROVIDERS

Doctors, dentists, specialists and how to contact them.

EMPLOYER INFORMATION

Current and previous employers and employment history.

EDUCATION

Current and previous enrollments and education history.

[I'd like help with this section.](#)

AUTHORIZED USERS

Set up authorized users to allow access to your account information.

Add a new authorized user

This person has access to the following information sections:

	Can View	Can Edit
Personal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Financial	<input type="checkbox"/>	<input type="checkbox"/>
Family	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Advisors & Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Documents & Accounts	<input type="checkbox"/>	<input type="checkbox"/>
Video Vault	<input checked="" type="checkbox"/>	<input type="checkbox"/>
End of Life	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Pets	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Veteran's Benefits	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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.

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.

Your life. Their future.