

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. www.mylifeandwishes.com

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



LOGGED IN AS JANE

Welcome Jane!

My Information

- 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.
- END OF LIFE**
My wishes, including final arrangements, gifts and plans, eldercare, and health care

MY ACCOUNT:
Account Settings
Billing
Authorized Users
Log Out

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="radio"/> Yes	<input checked="" type="radio"/> Yes
Financial	<input type="radio"/> No	<input type="radio"/> No
Family	<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> Yes
Advisors & Contacts	<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> Yes
Documents & Accounts	<input type="radio"/> No	<input type="radio"/> No
Video Vault	<input checked="" type="radio"/> Yes	<input type="radio"/> No
End of Life	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Pets	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Veteran's Benefits	<input checked="" type="radio"/> Yes	<input type="radio"/> No

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.