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**Your Logo Here**

**(Your Firm Name**) is providing you with access to the My Life and Wishes digital storage and planning platform as part of our Estate Planning Package – at no additional cost to you!

We’ve partnered with My Life and Wishes to upload and store the planning documents we’ve secured for you. However, the site is an all-inclusive, state-of-the-art portal where you can digitally store any other documents you wish to upload. In addition to documents, it is a place where you can store and keep track of all your on-line accounts, website logins and passwords, all available to you at the touch of a button, 24/7. It is a complete organizational and planning tool to keep your critical information safe and accessible to you and those who may need it when you’re gone.

You’ve planned and worked hard to make sure your loved ones will be taken care of. Make sure to protect these planning documents and everything else they will need with your new virtual vault through My Life and Wishes.

**We’ve taken the first step for you by creating your account. It’s simple to login and complete the rest on your own.**

**Step One**

Login to: (This will be a custom link/button from your website)

**Step Two**

Type in your email address: \_\_\_\_(the email address you used to set up their site)\_\_\_\_\_\_\_\_\_\_\_

Type in the temporary password we created for you: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Step Three**

**Change your password.**

From your dashboard, under MY ACCOUNT in the lower left-hand corner, click on Account settings. Click on the ACCOUNT INFO header or the right down arrow to expand this section. Type your current password into the space provided and include your new password where indicated. Hit the Save Changes button. If successful, a message will appear indicating your information has been updated. *Passwords must be at least eight characters long and include at least one number and one special character.*

**Or: Step Three**

Log in with the credentials listed above. You will then be required to change your password.

Enter the temporary password that was created for you, then create a new password. *Passwords must be at least eight characters long and include at least one number and one special character.* Hit the “Reset My Password” button. If successful, a message will appear indicating your information has been updated.

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**Other important steps/features to consider:**

1. **Assign Account Co-Owner**

If you are married, have a partner, or have someone you’d like to share an account with, you may want to consider inviting that person to be your account co-owner. 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 must accept the email invitation for this feature to be active.

1. **Consider Authorized Users**

Designating an authorized user is an important feature to consider. An authorized user does not have any of their personal information housed in your site. An authorized user is designated by you to “view only” or “edit” any section or all sections of your site. Whether you have one or multiple authorized users, you choose what you want your authorized user to be able to edit or see.

For example, giving your Advisor ongoing access to certain sections of your site will allow your Advisor to upload important planning documents or financial or legal updates directly into your site – making it easy to have all your planning documents kept current and housed safely and securely online.

1. **Enable 2 Factor Authentication**

Two-factor authentication (2FA) is a security process that uses two different methods when you login into your My Life and Wishes account. When you sign into your account, we will send a 6-digit code to your phone or email, whichever option you have selected.

**To enable any of the above features click on ACCOUNT SETTINGS in the lower left-hand corner of your dashboard. To enable 2 Factor Authentication, expand the ACCT INFO section.**

For more information on the features mentioned above, and additional helpful tools, click here to download our complete User Guide: [**MLW User Guide**](https://www.mylifeandwishes.com/wp-content/uploads/2018/MLW%20User%20Guide.pdf?_t=1553028542)

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1. **Materials and other important information**

Watch for emails from info@mylifeandwishes.com. These emails contain links to our User Guide, and include helpful information about the features and options included in your plan. (Make sure to mark as a safe sender to avoid these emails ending up in a clutter or spam folder.)

If you do not plan on sharing your account with anyone, you are being provided with a card and envelope for you to record your My Life and Wishes login information. We recommend you fill this out and store it in a secure place. Or, give it to a trusted loved one or your Advisor. That way, in the event of an emergency, the person you designate will have the information to access your site.

An ICE (in case of emergency) wallet card is also provided so in the event of an emergency, first responders will know who to contact for advance directives, organ donation or any other instructions you may want your loved one to provide.

Lastly, My Life and Wishes, along with **(Your Firm Name)** have created a “Refer A Friend” discount card. We love referrals! Our goal is to provide the best service possible and look forward to the opportunity to provide our great services to your friends and family.

For additional assistance, contact the My Life and Wishes Customer Service Team at: support@mylifeandwishes.com

or call us at 844-369-4747