Create a New Account – Step-by-Step Instructions

Prior to your Onboarding call, you were provided with a link to the “Create Your Account” page.
You are also able to create an account from the My Life & Wishes page;

👉 https://plan.mylifeandwishes.com/#!/createAccount

1. Enter Your Client’s Information

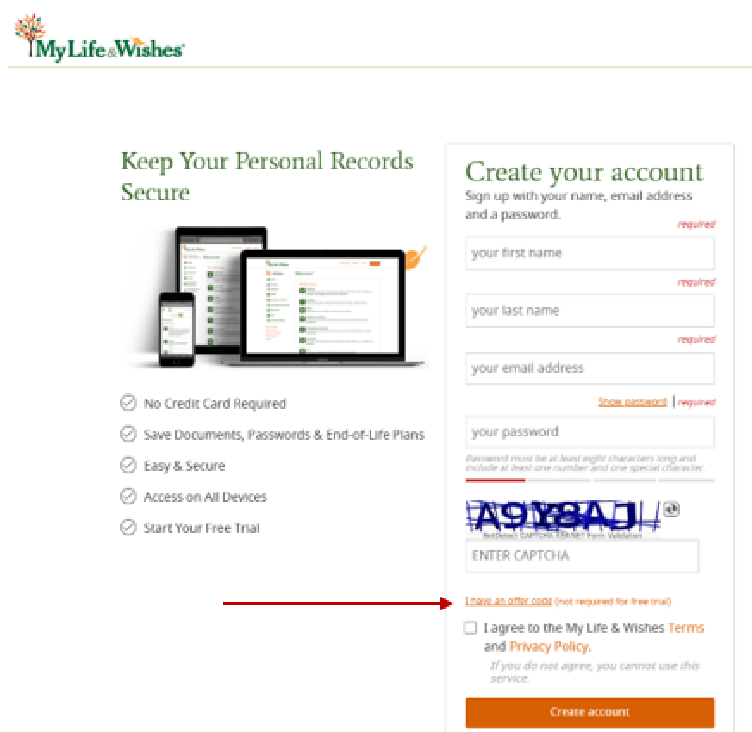
On the account creation page:

- Enter your client’s first name, last name, and email address.

- Create a temporary password for the client (you’ll provide this to them later).

- Complete the CAPTCHA.

- Click "I have an offer code."



2. Apply the Offer Code

- Enter the offer code provided by the MLW team.

- Agree to the terms and conditions.

- Click Create Account.

3. Skip Optional Setup Steps

After creating the account, you'll be prompted to:

- Set up Two-Factor Authentication (2FA)

- Invite a Co-Owner

Important: Skip both steps. The client can enable 2FA and invite a Co-Owner later in their Account Settings (lower left corner of their dashboard).

4. Begin Entering Client Information

Once past the optional steps, the account is ready for use. You can begin entering your client's information.

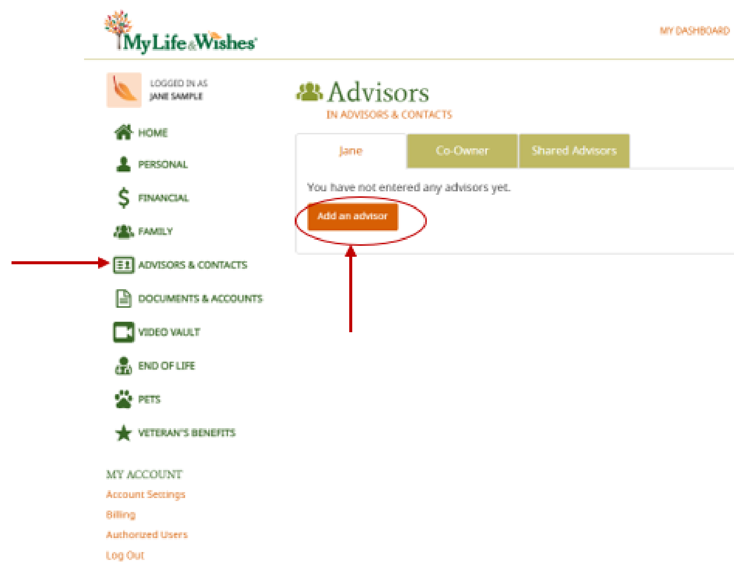
5. Add Your Advisor Information (Optional)

- Go to the Advisors section.

- Choose your role from the Advisor Type dropdown (e.g., Attorney, Accountant, or Other).

- If you select Other, a text box will appear for you to enter your title or occupation.

- Follow the prompts and complete any required fields.

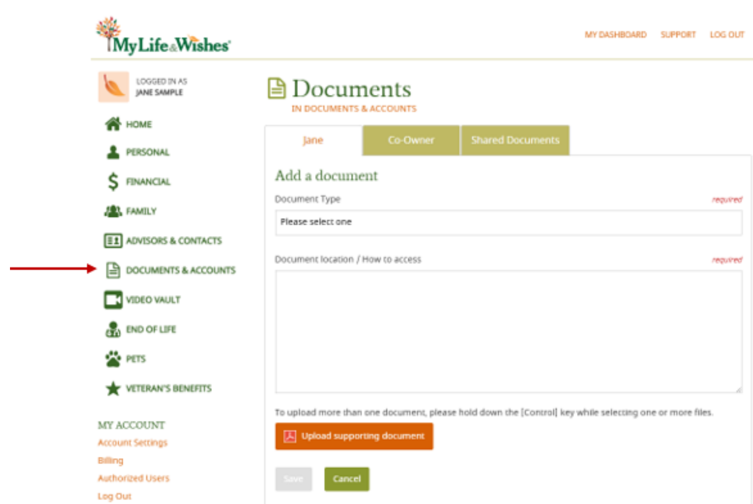


6. Upload Client Documents (Optional)

- Navigate to the Documents & Accounts section.

- Follow the intuitive prompts.

- Ensure any required fields are completed.



7. Final Steps

- Log out of the client account.

- Email your client their Client Instruction Sheet, which includes:

  - Step One: Link to the login page

  - Step Two: Their login credentials (email + temporary password)

  - Step Three: Instructions for changing their password

The instruction sheet also explains Co-Owner and Authorized User features and includes a link to the User Guide.

Clients can access the User Guide anytime from their dashboard by clicking “I need help with this section,” then scrolling to the top for the link.