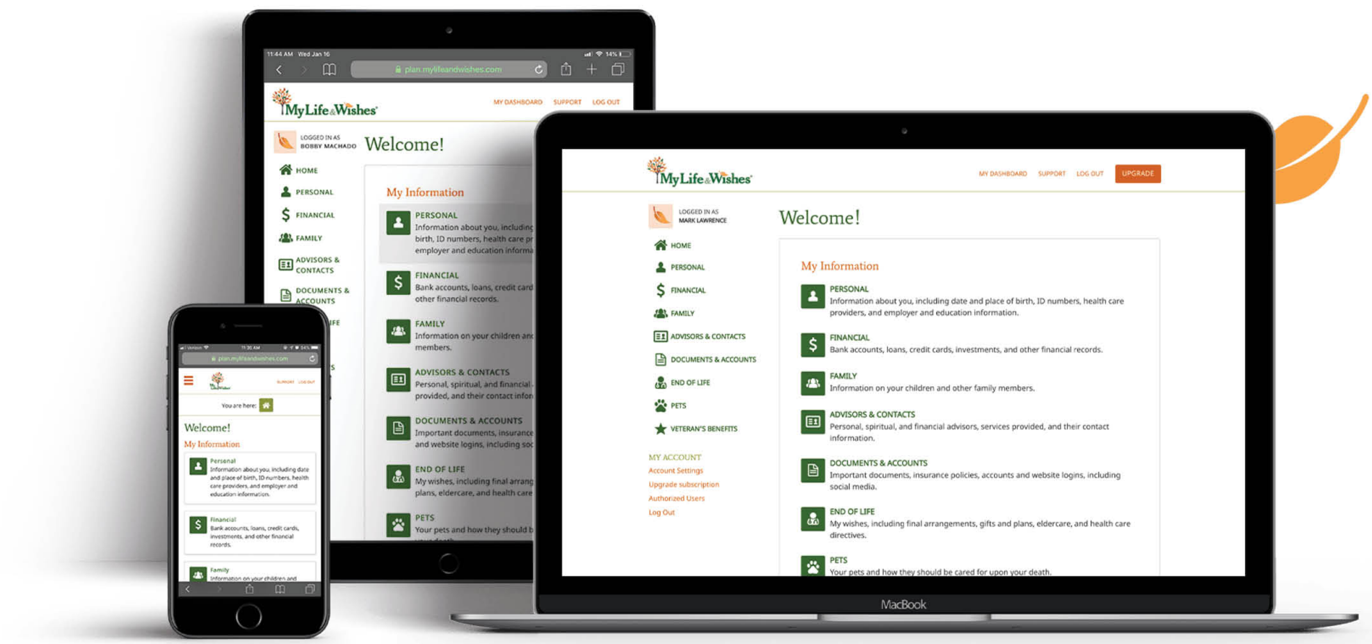
My Life & Wishes
User Guide



www.MyLifeandWishes.com

My Life & Wishes User Guide

Table of Contents

My Life & Wishes User Guide: Site Navigation

Welcome to My Life & Wishes! This document provides some tips to help you navigate the site, as well as point out some important features you will need to know.

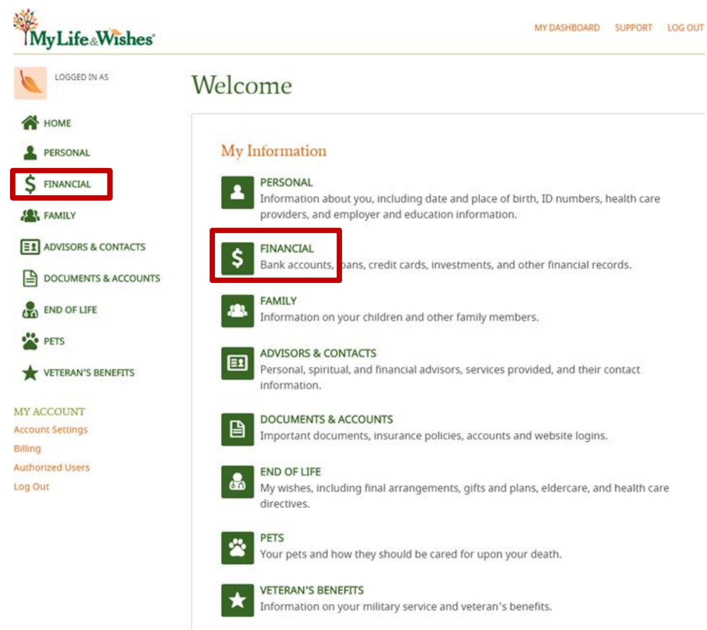
When signing in to your account, make sure to use the email address and password you used when you first set up your account. https://plan.mylifeandwishes.com/#!/

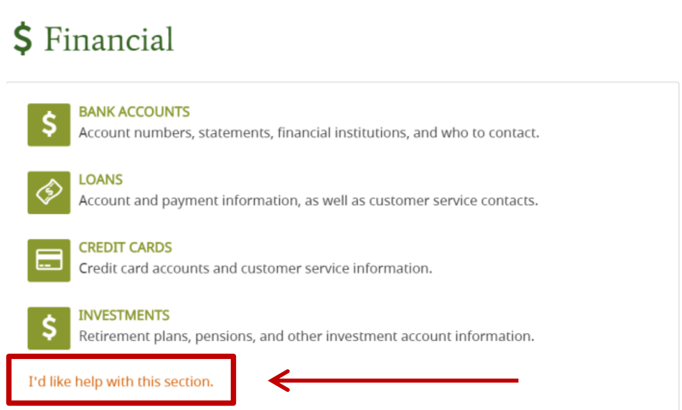
If you forget your password, click on the "forgot password" link and an email will be sent to you with instructions on how to re-access your site.

Once logged in you will be taken to your My Life & Wishes home page. From here you can access any section of your site by clicking on headings located in the center or left side of the page.

For example, click on "Financial" to go to the Financial section.

To make it easy for you to maneuver, the main sections are always visible on the left side of the page.

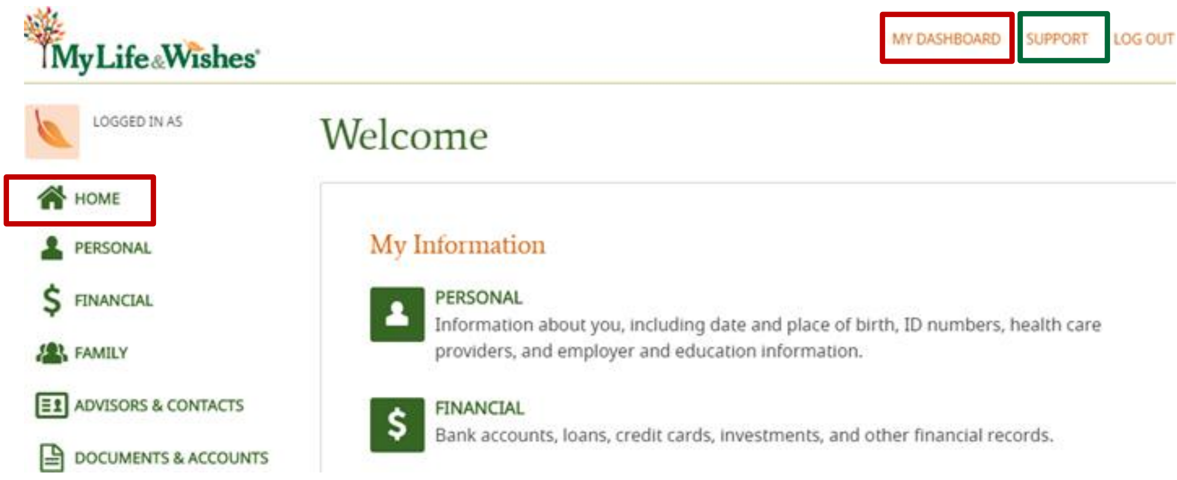




Each of the main sections have additional sub-sections. To complete and access these subsections, click on a section title, such as "Financial."

Each sub-section includes an "**I'd like help with this section**" link. Clicking on this link will open a new window that lists the type of information you may want to include and provides suggestions as to what documents you may want to upload to that particular segment. After reviewing these guidelines, you can simply "x" out of that page on the top of your screen.

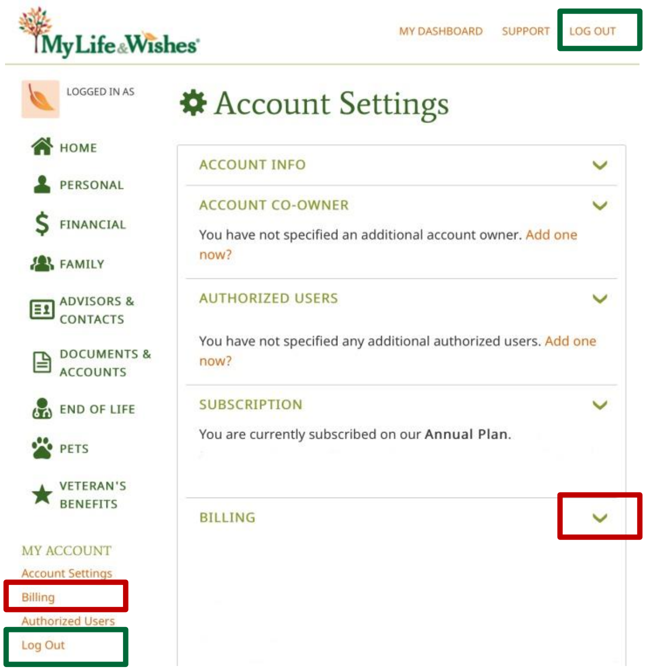
To return to your home page at any time, simply click on "Home" on the left hand side or click on "My Dashboard" at the top of the page (see image below).



If you have questions about your site, there are several ways to get help. Click on "**Support**" at the top of the page (*see image above*) for an extensive list of FAQs that address the most frequent questions from users.

As you scroll through the FAQs, you will find a link to download our "[Getting Started Guide,]" which is another resource available to you.

You can also click on the "**Contact Us**" link at the very bottom of the page (*see image below*). This link will provide you with an area to email our team, as well as the telephone number to speak directly with a team member. Our team members are available from 8:00am to 5:00pm, Monday through Friday.



The billing for your My Life & Wishes account renews automatically. You can manage your billing information by clicking on the "**Billing**" link from the menu on the bottom left. This opens the Account Settings page. Click on BILLING or on the arrow to the right of the BILLING heading to review or edit your information.

We know credit card information can change frequently. To change the billing information, click the "**Manage billing information**" link. Then, simply type over the existing information and click on the "**Save updates** " button. This will ensure your My Life and Wishes subscription continues without interruption.

When logging out, simply click on the "**Log Out**" link on the top right hand corner of your screen or the lower left hand side of your screen. For security purposes, you will automatically be logged out after a period of time due to inactivity.

For more detailed navigation and feature help, refer to additional sections of the My Life and Wishes User Guide.

My Life & Wishes User Guide: Account Co-owners

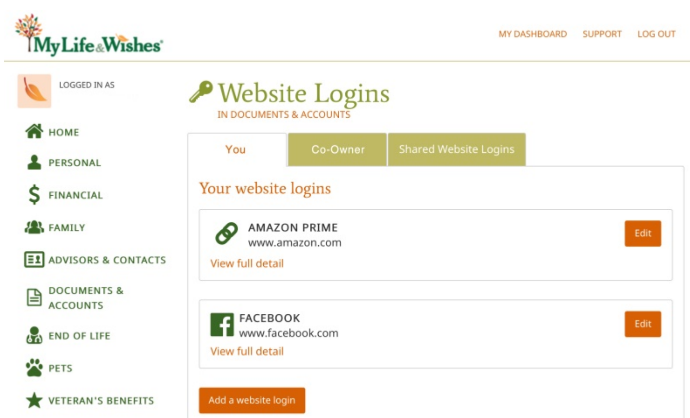
If you are married, have a partner, or have someone you'd like to share an account with, you may want to consider inviting that person to be your account co-owner. When you invite an account co-owner, your site will expand to accommodate information for two individuals, as well as joint information.

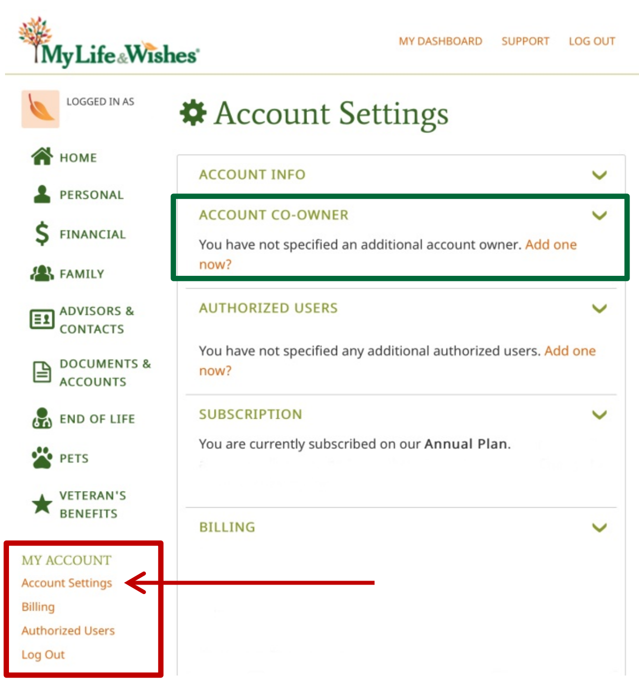
For example, a married couple may have many joint accounts, such as bank accounts, memberships, home accounts, and utilities. Also, you each may have many personal or individual accounts, such as social media and website login information.

When you have a co-owner, your site will display three separate tabs for each section (*see image on right*). One labeled for you, one labeled for your co-owner, and a third labeled as joint accounts or shared information.

This makes it easy for each person to enter personal accounts, desires, and wishes under their individual tabs, while making it easy to record various joint accounts.

Both you and your co-owner have full access to all tabs and may change or update any information within the site.





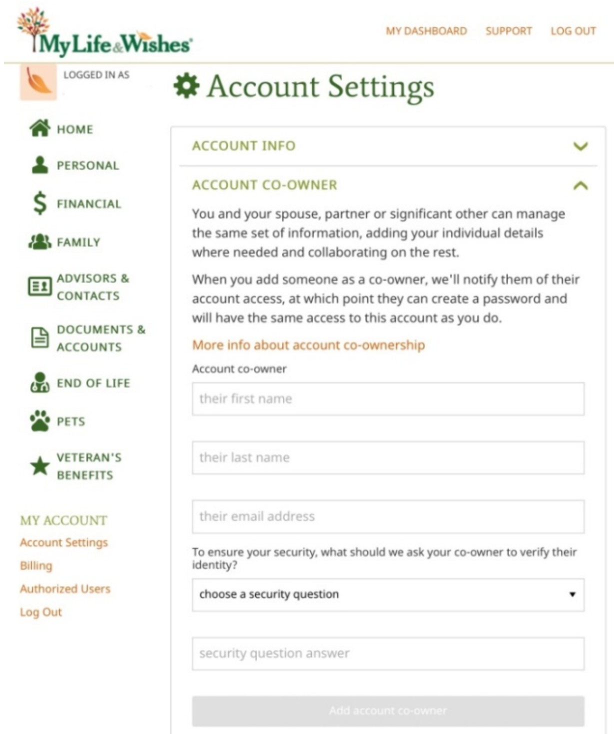
You were asked if you wanted to add a co-owner when you first signed up. If you skipped this step, click the Account Settings link from the menu on the bottom left (*see image on left*).

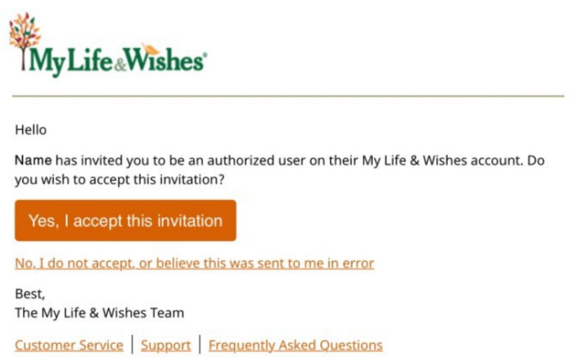
To add a co-owner you will need to invite them via email. Click on the ACCOUNT CO-OWNER or the down arrow to the right of the ACCOUNT CO-OWNER heading then click on the highlighted "Add one now."

Note: In the lower left-hand corner you will see the headings: Account Settings, Billing, and Authorized Users. By clicking on any one of these you'll be brought to some important settings you'll want to consider for sharing access to your account.

Complete all of the fields in the account co-owner section: your co-owner's first name, last name, and email address.

You will also need to choose a security question and answer.



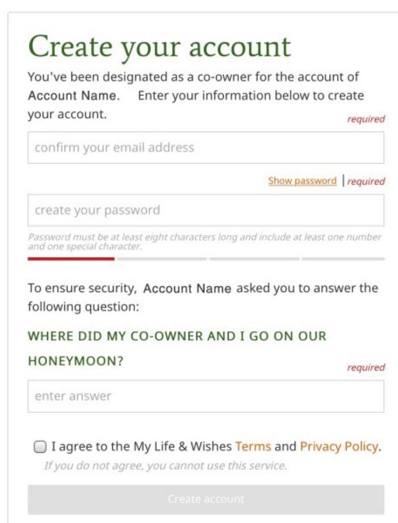


Once you click the "Add Account Co-Owner" button, an email will immediately be generated to the address you indicated for your co-owner.

Your co-owner should click on the "Yes, I accept this invitation" button.

Your co-owner will then be brought to a screen where they will create their password and answer your security question.

Once this step is complete, your co-owner will be brought directly into your shared account to begin exploring or entering information.



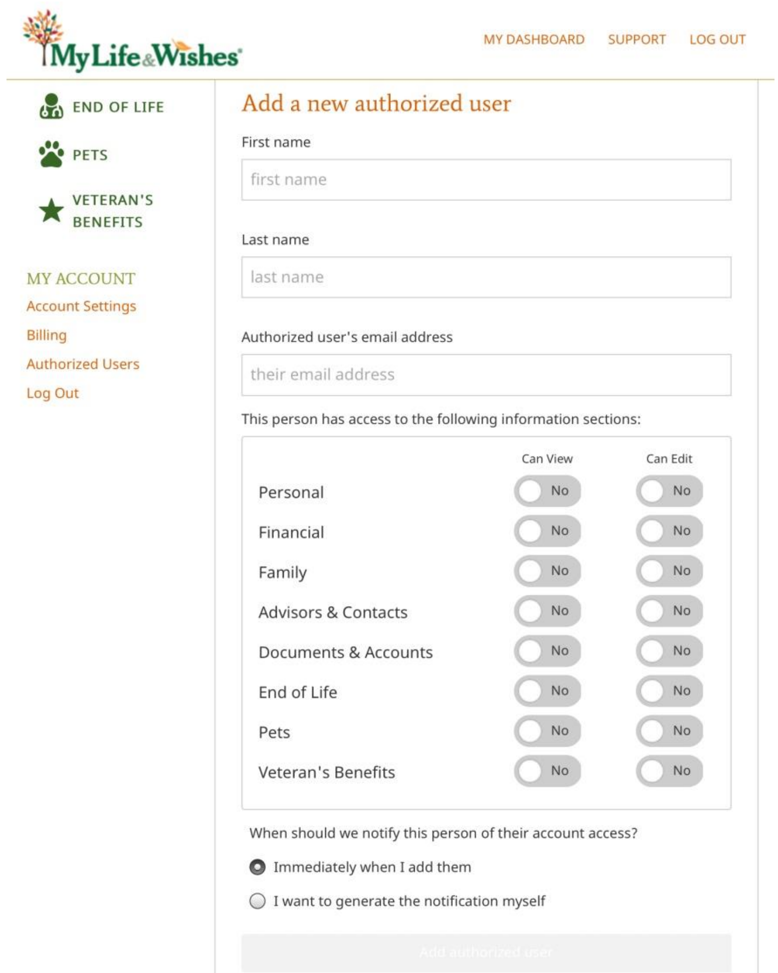
My Life & Wishes User Guide: Authorized Users

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 see or edit.

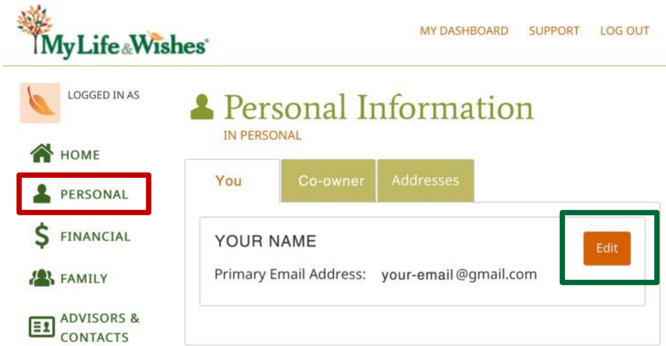
As an example, you might want to give adult children viewing only access to your end of life section to be able to immediately see advance directives or other information in the event of an emergency. However, you may not want to allow viewing or editing information to your financial section.

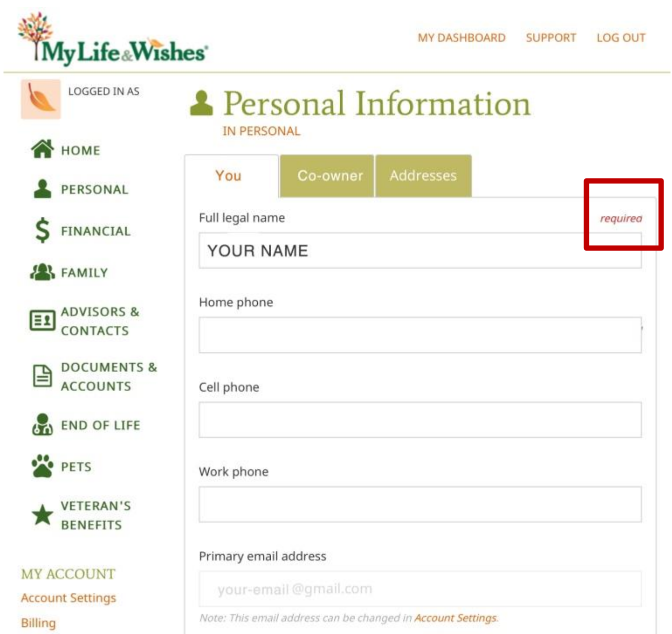
Another way to use the authorized user capability is to provide access to portions of your site to your Financial Advisor or Attorney. For example, giving your Advisor access to the financial section of your site will allow your Advisor to upload important planning documents or financial or legal updates directly into your site – making it easy to have all your planning documents kept current and housed safely and securely online.

There is no limit to the number of authorized users you assign. Each time an authorized user accesses your account, you will receive an email notice. In addition, your authorized users will receive a warning message when logging into your account, advising them that you will be notified (via email) that they have accessed your account. You can remove an authorized user at any time.



When first logging in, your name and email address will automatically populate in the **Personal** section of your site. To add additional information, click on the orange "**Edit**" button.





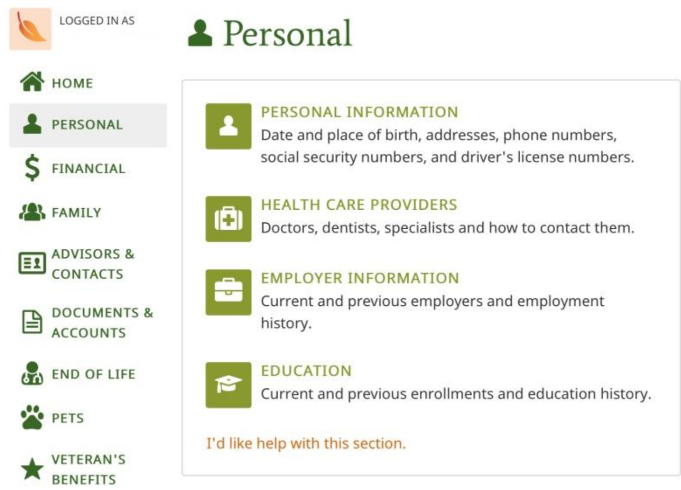
You may wish to add various phone numbers, an additional email address, your driver's license number, or your social security number. Many of these fields are free-form, to accommodate notes and details.

You may also add any number of addresses by clicking on the Addresses tab in this section. The name of the address and address line 1 are the only required fields on this tab.

Most areas in this section are not required, to allow you to enter as little or as much information as you'd like. If a field is required, the text "*required*" will appear in red next to that field.

When you are through entering information in any section, make sure to click the Save or Cancel button at the bottom of the section you are completing. Once you click Save, you will receive a message at the top of your screen showing that you've had success and your information (or changes) have been saved.

The Health Care Providers, Employer Information, and Education segments all work similarly to the personal information segment.



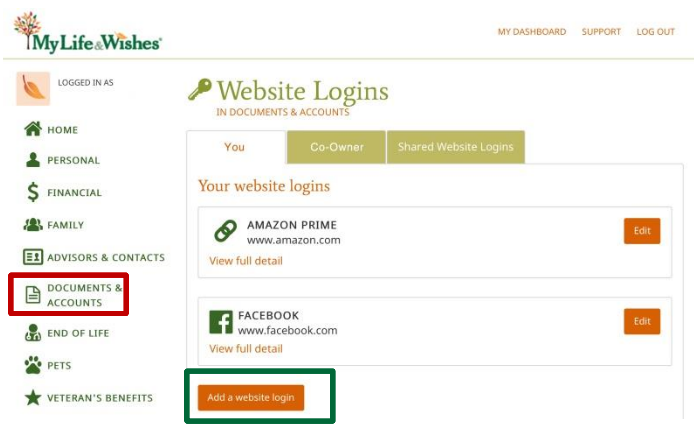
My Life & Wishes User Guide: Recording Website Logins and Passwords

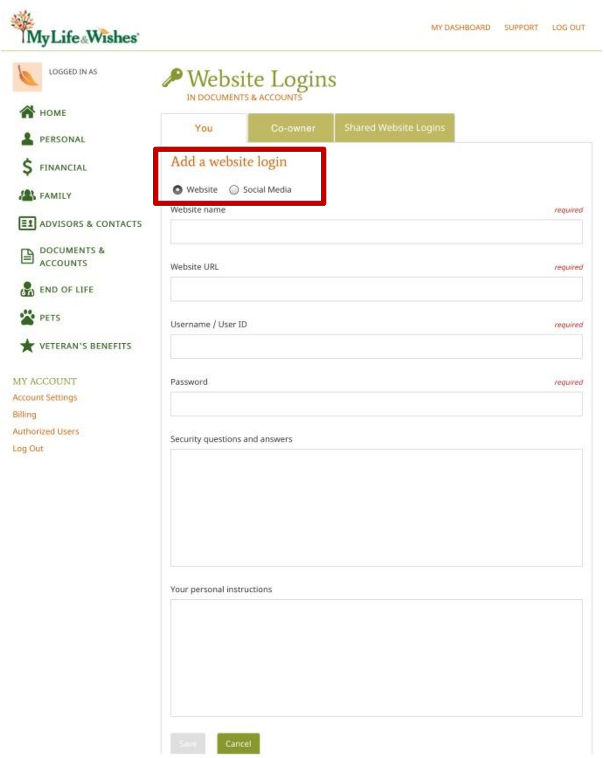
One of the most frequently used sub-sections is **Website Logins**, located within the Documents & Accounts section of your site.

Certain sections of your site allow you to include website information, along with web address, login information, password and challenge questions and any other access details you may want to include.

If you included website information in any subsection of your site, this information will also appear in the Documents & Accounts section under Website Logins.

To enter a website login from the documents and accounts website login section, simply click on the **Add a website login** button on the bottom of the page.





Indicate whether this is a website or social media category. Then enter information into the required fields and click the "Save" button when done.

You will receive a message at the top of your screen indicating that your information has been saved.

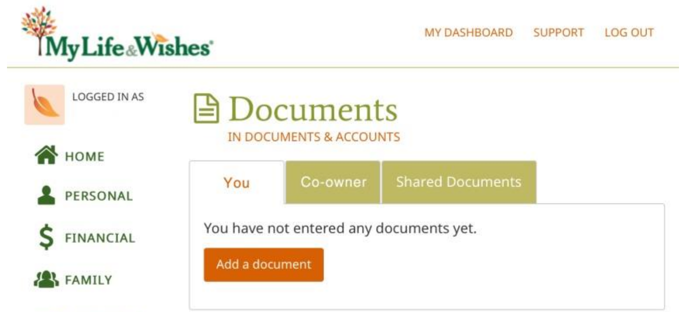
Additional Notes:

- Your website and social media accounts will be shown in alphabetical order.
- While you can record your website URLs into your site, our security protocols will not enable a direct link. You do have the ability to highlight and copy your links and paste into a new browser.

Uploading your important documents into your My Life and Wishes site, allows you to access them from anywhere you have an internet connection.

From the menu on the left, go to Document and Accounts, then click on the Documents sub-section.

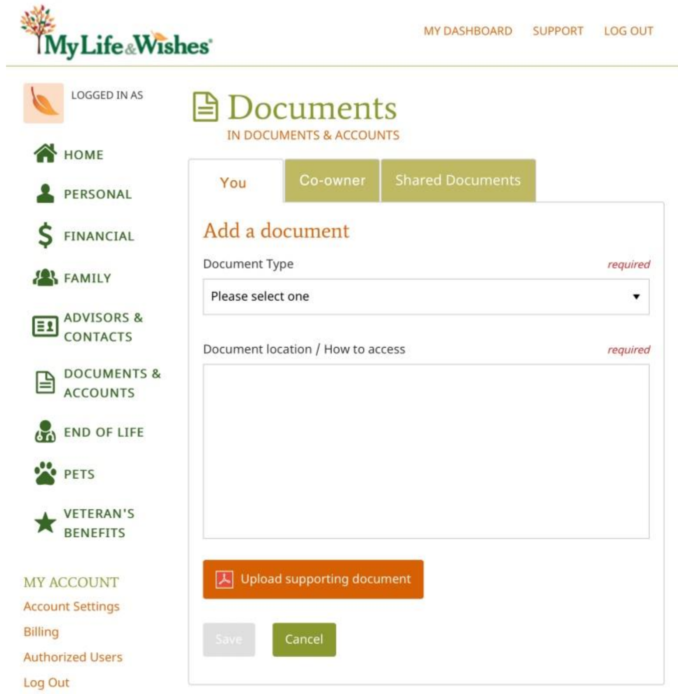
From here click on the orange “Add a document” button to be taken to a new screen.

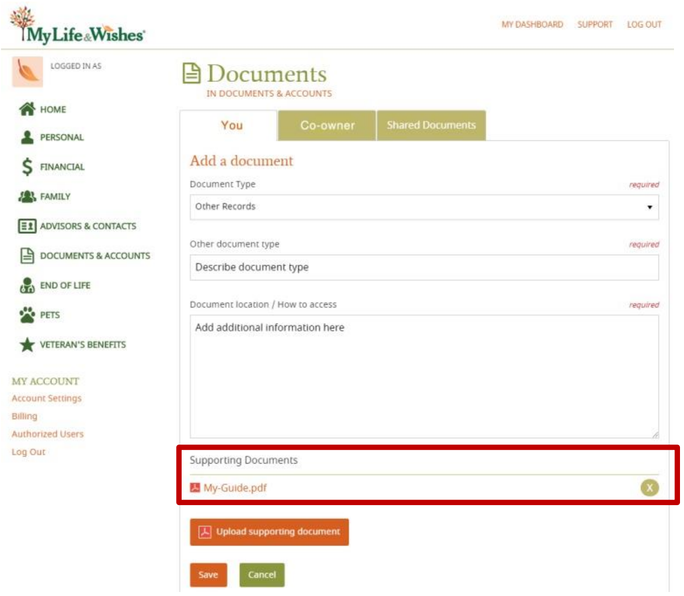


In the Add a document screen, describe the document you want to upload.

If there isn’t a description you’re looking for in the drop down list, choose “other” from the list and a field will be added for you to name your document type.

Once you’ve selected the document type and completed the additional fields, click on the orange “upload supporting document” button. A window will appear for you to browse your computer for the file you wish to upload.





Once your document is uploaded, you will see it listed under Supporting documents. Once you've completed your page, hit the orange Save button.

A message indicating your information has been successfully saved will appear at the top of your screen.

Important Notes:

- Your site was designed to upload documents in pdf format only.
- Our security has been designed to protect and encrypt your files while they are being transmitted into your site.
- All documents entered into this section will be shown in alphabetical order.
- Insurance policies, advance heath care directives, or Veterans or military records, may be uploaded into this section or directly into those designated areas of your site.
- There is no limit to the number of documents you may upload to your My Life & Wishes site.

Account Login

You must always log into your site using the email address associated with your account. To update this information, refer to the *Changing Email or Login Information* section.

Changing Email or Login Information

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. Replace your current email address with your new information and hit the Save changes button. *For security reasons, any change to your email address will be saved, but will not take effect until you confirm it via an email we will send you. Once you confirm your updated email, you will then log into your account using your updated email address.* Any future communication from My Life and Wishes will be sent to the your current email address.

Changing Your Name

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. Simply change the first or last name that is shown and click on the “Save Changes” button. Your changes will appear immediately.

Changing 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. If your new password or existing passwords do not match, you will receive a message indicating this at the top of your screen. *Passwords must be at least eight characters long and include at least one number and one special character.* Your My Life and Wishes site does not require you to periodically update your password.

Closing Your Account

To close your My Life and Wishes record, from your dashboard click on account settings in the lower left hand corner of your screen. Click on CLOSE ACCOUNT or click on the down arrow to the right of CLOSE ACCOUNT.

Your login will stay active for 90 days. You may login and review or print a summary of your record during this time, but you may no longer add information or make any changes.

After 90 days, your account and your data will be permanently deleted. To restore full account access within the 90-day grace period, you will need to re-subscribe to the service.

Entering or Saving Information

Each of the sections have certain required fields. The number of required fields were designed to be minimal to allow you to complete as much or as little of each section as you'd like. To successfully save new information, make sure you've entered information into these required spaces. The green save button will then highlight allowing you to click on it. You will receive a message indicating your new information or changes to existing information are successful.

Password Reset

If you've forgotten your password, click on the *Forgot your password?* link from the login page. Enter the email address associated with your account to receive an email with password reset instructions. Once you receive the email, click on the link which will allow you to create your new password. *Passwords must be at least eight characters long and include at least one number and one special character.*

Printing Your Record

To print a copy of your My Life and Wishes record, from your dashboard click on account settings in the lower left hand corner of your screen. Click on PRINT SUMMARY or click on the down arrow to the right of PRINT SUMMARY. Agree to the security warning message and click on "generate pdf of my information" button. Your record is downloaded in a pdf format and will include all information you've entered into your site. Documents you've uploaded can be opened and downloaded separately. The print feature is only available on annual subscriptions.

Renewing Your Subscription

Your subscription will renew automatically on the same date each month or year based on the billing mode you elected. You will receive an email notification about the upcoming renewal and when your account has been renewed.

Sharing Your Account Information

Each My Life & Wishes account is designed for a primary account holder and an account co-owner. Both the primary and co-owner can view, add, and change the information in the account. In addition, the account owners can designate authorized users, and can set permissions for each authorized user

Only you, your co-owner, and your authorized users can view your My Life & Wishes information. To ensure your information is safe, there are multiple levels of security to prevent anyone else from viewing your information, and that includes My Life & Wishes employees.

Refer to the Co-Owners and Authorized Users sections of the User Guide for additional information.

Updating Billing Information

To change the billing credit card information on file, from your dashboard click on billing in the lower left hand corner of your screen. Next either click on BILLING or the down arrow to the right of BILLING, then click on Manage billing information. Type over the existing information and hit "Save Updates". My Life and Wishes accepts Visa, MasterCard and Discover.

Uploading Files or Documents

Your My Life and Wishes site was designed to upload files in pdf format only. You may upload files in the Documents and Insurance policies sections in Document & Accounts, the Health Care section in End of Life and in the Veterans Benefits section of your site. There is no limit to the number of documents you upload to your My Life and Wishes site. Refer to the Uploading Files section of the User Guide for additional information.