



If you're ready to grow your family, you'll want to be as prepared and organized as possible so you can be ready for life's changes. FidSafe® provides you and your family with the peace of mind of knowing your critical documents are securely stored in one place and can be easily accessed wherever and whenever you might need them.

## 01 HEALTH CARE

To ensure your medical documents are ready.

- Life Insurance Policy
- Medical Insurance Card
- Health Care Proxy and Instructions
- Vaccination and Allergy Records
- Doctor Information (Family Medicine, Dental, Optical, etc.)

## 02 PERSONAL

Comprehensive list of personal identification information.

- Birth Certificate
- Passport
- Deed and Titles
- Marriage License
- Vehicle Title

## 03 FINANCIAL

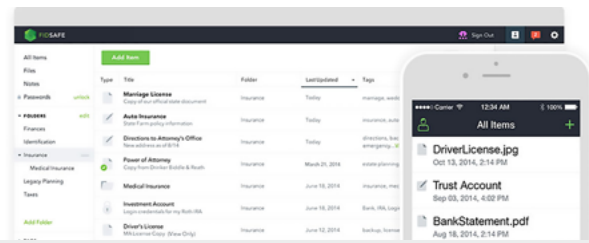
Records of existing financial statements and accounts.

- Loan / Mortgage Paperwork
- Major Debt Repayment Records
- Tax Returns
- Pension Documents and 401(k) Information

## 04 LEGACY PLANNING

For your loved ones to be well prepared in the event of your death or an emergency.

- Last Will and Testament
- General Durable Power of Attorney
- Document Care Instructions
- Transfer on Death Registrations and Beneficiary Designations




### FidSafe Tip

As your family grows and as you get older, share your important files with loved ones who may need immediate access to them in times of emergency — access your FidSafe® on desktop, tablet or mobile devices. Or [download the iOS app for iPhone](#) today.



# READY SET... DOWNSIZING

If your children have grown and left home and you're ready to downsize and unwind, you want to have all critical documents organized and accessible so you can be ready for life's changes. With FidSafe® you can securely share your files with family members and access them wherever and whenever you might need them.

## 01 HEALTH CARE

To ensure your medical documents are ready.

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- Life Insurance Policy

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  - Medical Insurance Card

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  - Medicare / Medicaid Policy

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  - Health Care Proxy and HIPAA Authorization Form

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  - Advanced Medical Directive

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  - Long-term Care Policies

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  - Copies of Active Prescriptions and Scheduling

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## 03 FINANCIAL

Records of existing financial statements and accounts.

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- Social Security Benefit Application

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  - Pension Plan Info

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  - Loan / Mortgage Paperwork

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  - Tax Returns

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## 02 PERSONAL

Comprehensive list of personal identification information.

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- Passport

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  - Deed and Titles

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  - IDs (Birth Certificate, Social Security Card, Citizen Documents)

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## 04 LEGACY PLANNING

For your loved ones to be well prepared in the event of your death or an emergency.

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- Last Will and Testament

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  - Trust Documents

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  - Funeral and Burial Plans

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  - List of Key People

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  - General Durable Power of Attorney

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  - Preferred Care in the Event of Incapacitation

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# SIGN-UP

FidSafe® is quick, easy and free to use. It's your secure online solution that ensures the critical files you need are available to you and your family whenever and wherever you need them. Get started securing your critical documents today.