

My Life & Wishes User Guide: Account Co-owners

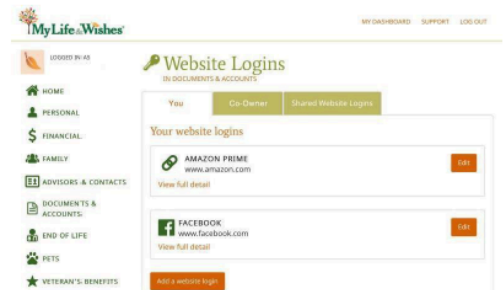
If you are married, have a partner, or have someone you'd like to share an account with, you may want to consider inviting that person to be your account co-owner. When you invite an account co-owner, your site will expand to accommodate information for two individuals, as well as joint information.

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.



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 feature is to provide access to your Financial Advisor, CPA or Attorney.

For example, giving your Advisor access to the financial section of your site will allow your Advisor to upload important planning documents, financial or legal documents or updates directly into your site. Whether you provide temporary or permanent access, this makes it easy to have your planning documents current and housed safely and securely online.

There is no limit to the number of authorized users assigned to any one account. Each time an authorized user accesses an account, the account owner receives an email notice. In addition, the authorized user receives a warning message when logging into the 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.

