



Getting Started with LifeSite Plus

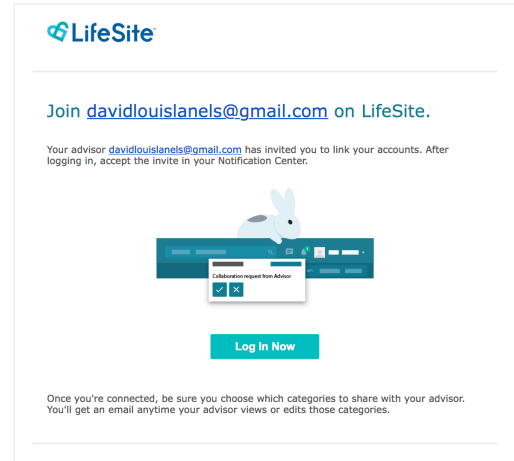
LifeSite Plus lets you securely manage and share your most important files
and information with your advisor.



Setup Your LifeSite

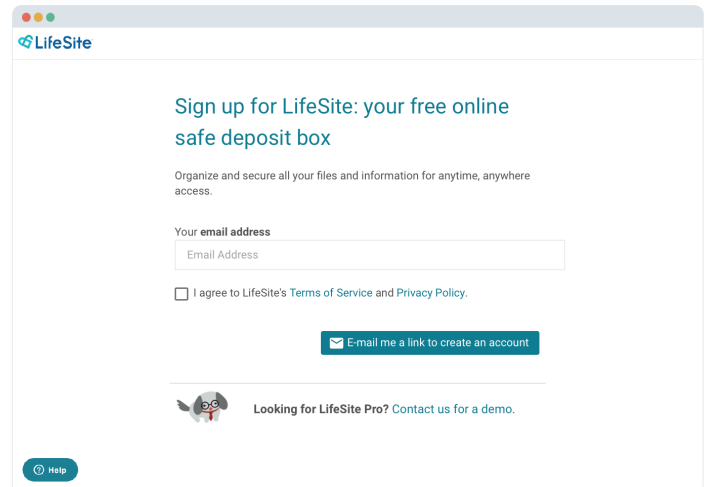
Step 1: Welcome to LifeSite

Once your advisor has sent you this email invite, you'll be able to create your free LifeSite Plus account.



Step 2: Create Your Account

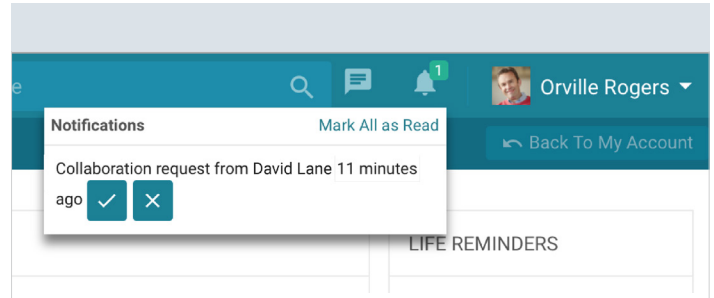
Be sure to use the same email address you received the email invite when creating your LifeSite account.



Setup Your LifeSite

Step 3: Accept Your Invite

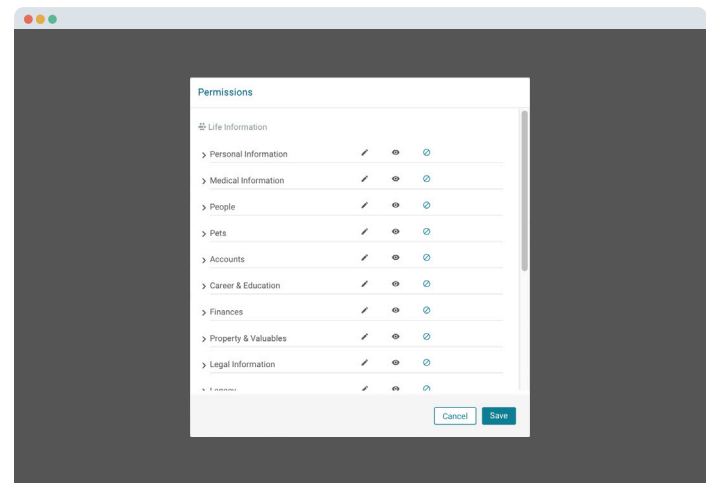
Connect your LifeSite account with your advisor by first accepting their invite.



Step 4: Set Advisor Permissions

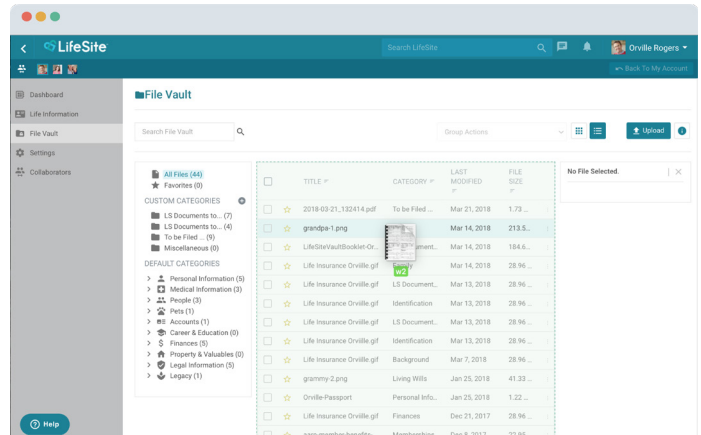
Choose the categories you'd like your advisor to view, edit, or be blocked from.

Sharing your account allows your advisor to better manage and advise you on everything related to your life's information.



Save Your Data

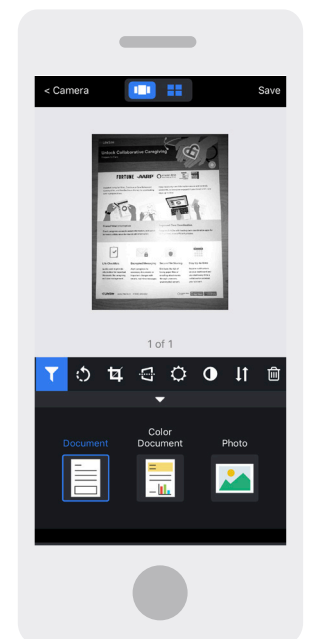
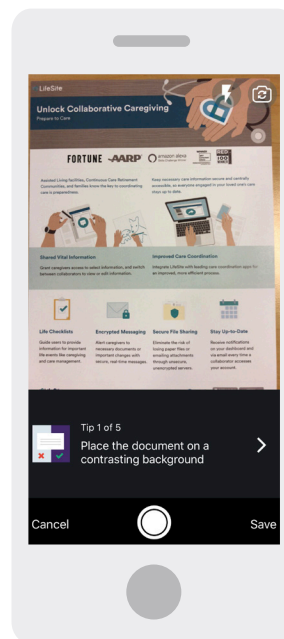
Your LifeSite account is now linked with your advisor. Save a file to your File Vault from your web browser.



Download LifeSite's free [mobile app](#) to save a file using your favorite device.

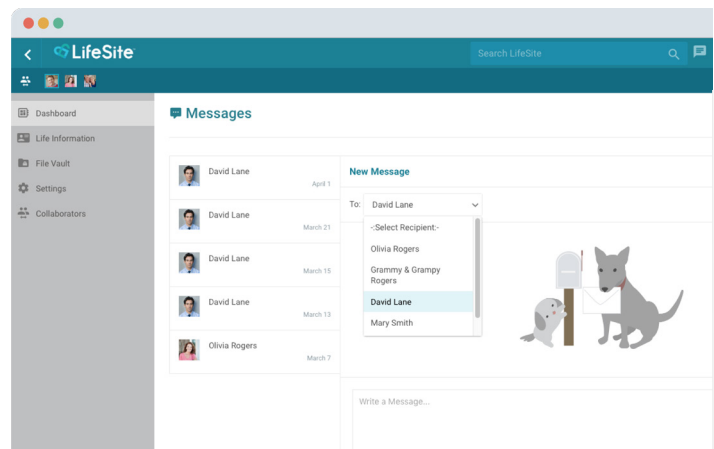
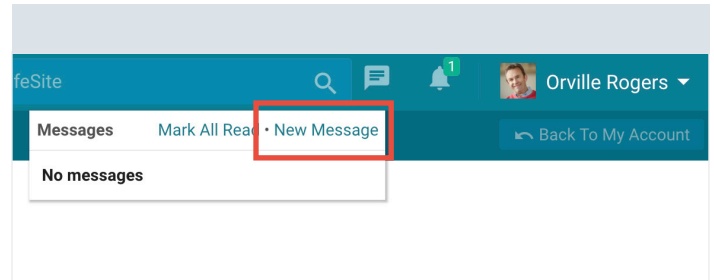


The mobile app's built-in scanner lets you “point and shoot” to scan, edit, and store important files on-the-go.

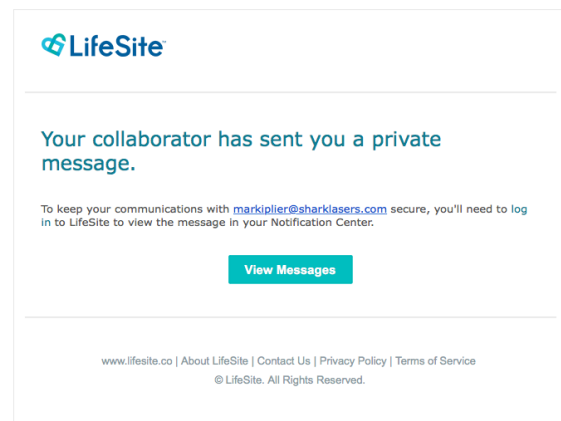
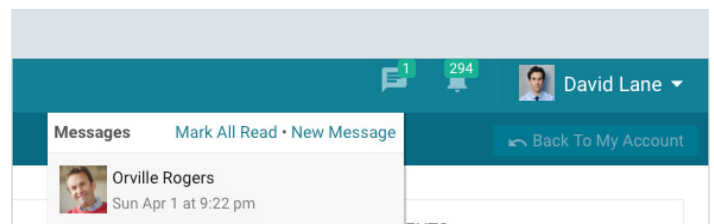


Start Collaborating

Send your advisor a secure message to let them know you've added a file or made a change that requires their attention.



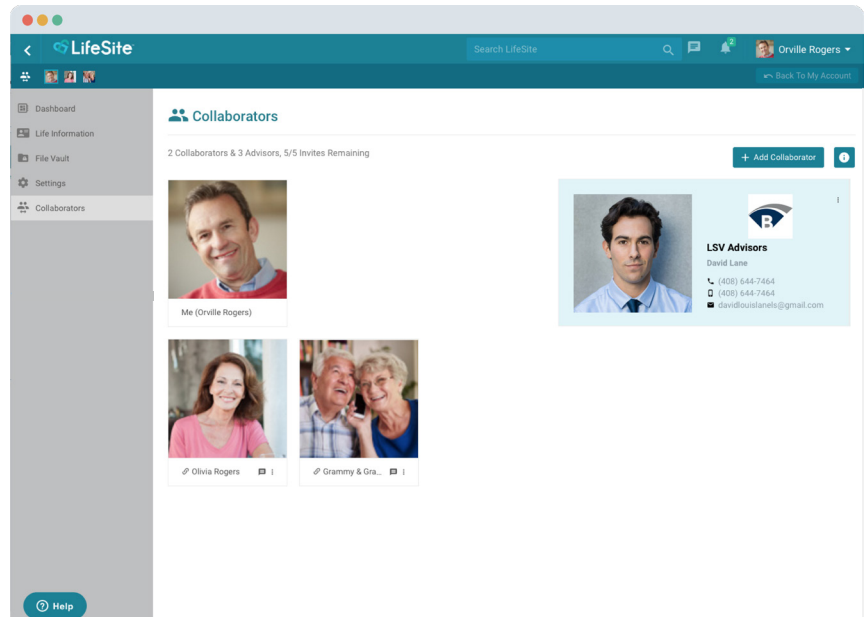
Your advisor is notified immediately of new messages in their LifeSite and by email.



Build Your Team

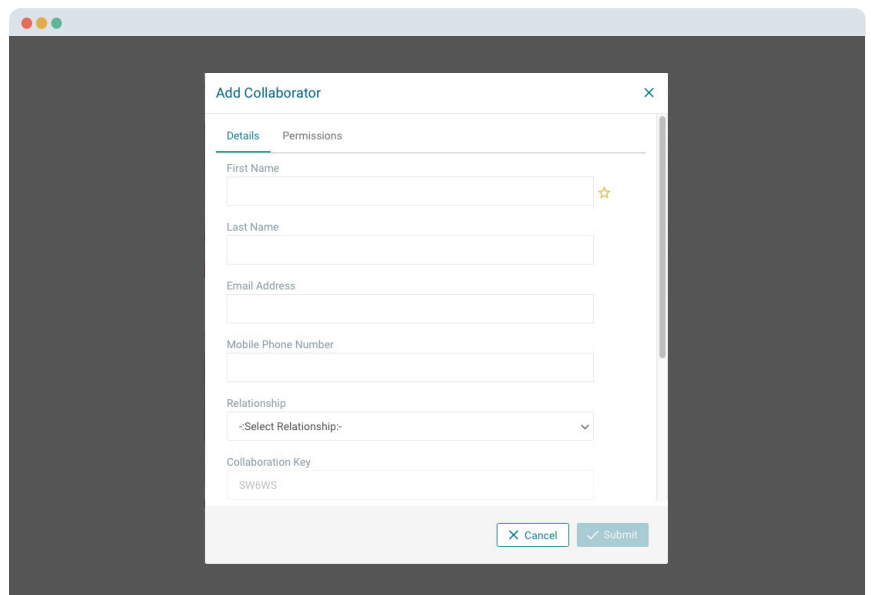
Step 1: Manage Collaborators

Managing your family's information is a team sport. You can see both your collaborators and advisors on this page.



Step 2: Invite Collaborator

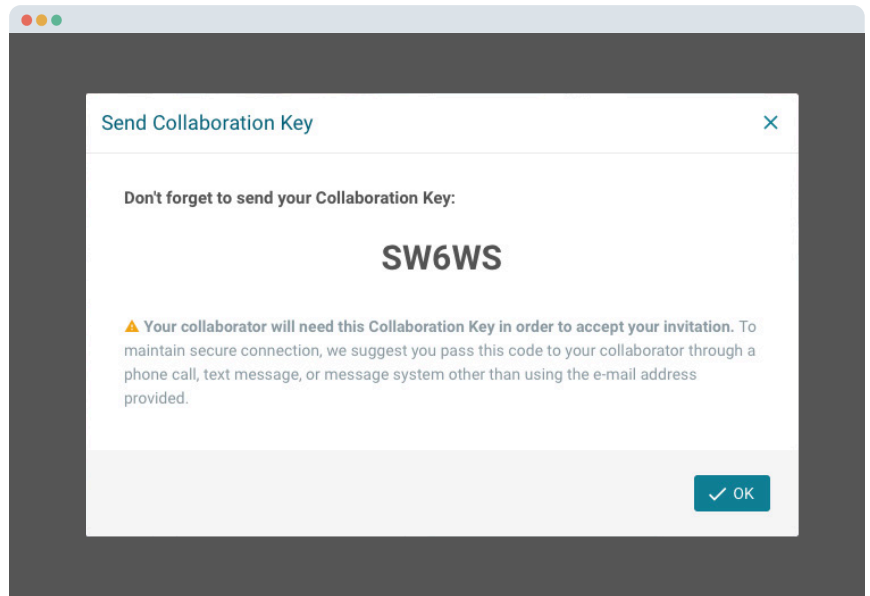
You'll just need a name and email address to add a collaborator.



Step 3: Share Collaboration Key

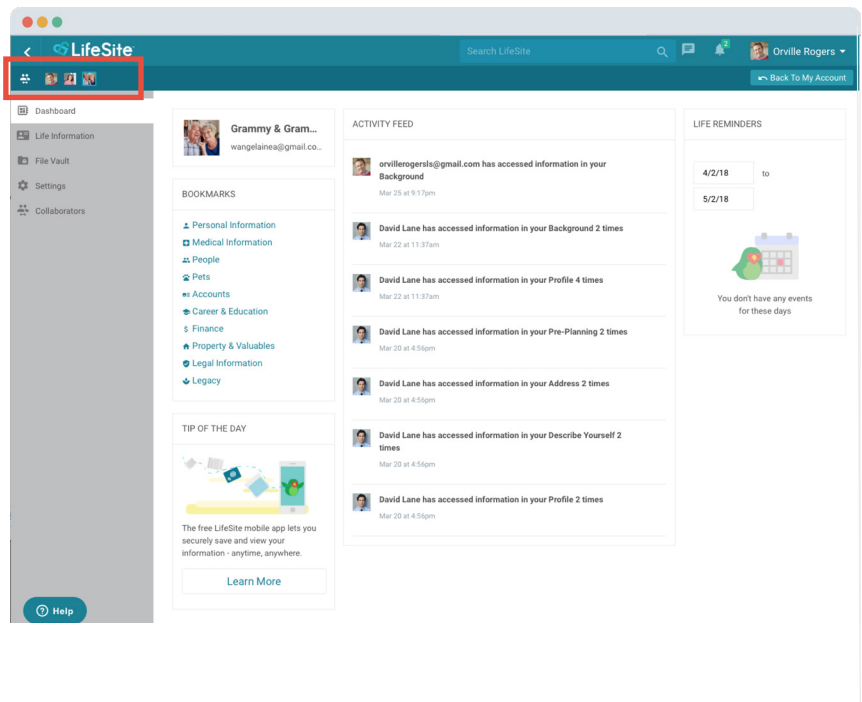
Contact your collaborator directly to pass along the collaboration key. Without it, your collaborator will not be able to accept your invite.

The collaboration key is automatically generated to protect your LifeSite account. LifeSite does not email it to your collaborator, in case their device(s) or email address is compromised.



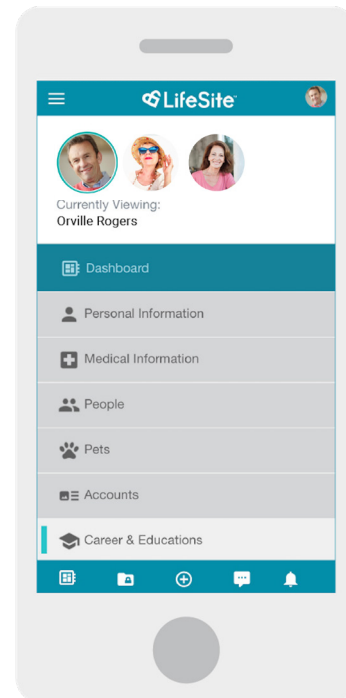
Step 4: Switch to Your Collaborator

Once your collaborator has accepted your invite, you'll be able to easily switch to their account in the Collaborator Navigation Bar.



Anytime, Anywhere Access

Your information needs to be as mobile as your lifestyle. Don't forget to download the [LifeSite mobile app](#) so you're never tied to your home computer.



Use your voice to quickly and easily look up your LifeSite information with the [LifeSite skill](#) for Amazon Alexa.



Alexa, ask LifeSite "How much is my health insurance premium?"

Your health insurance premium is \$200 monthly.

