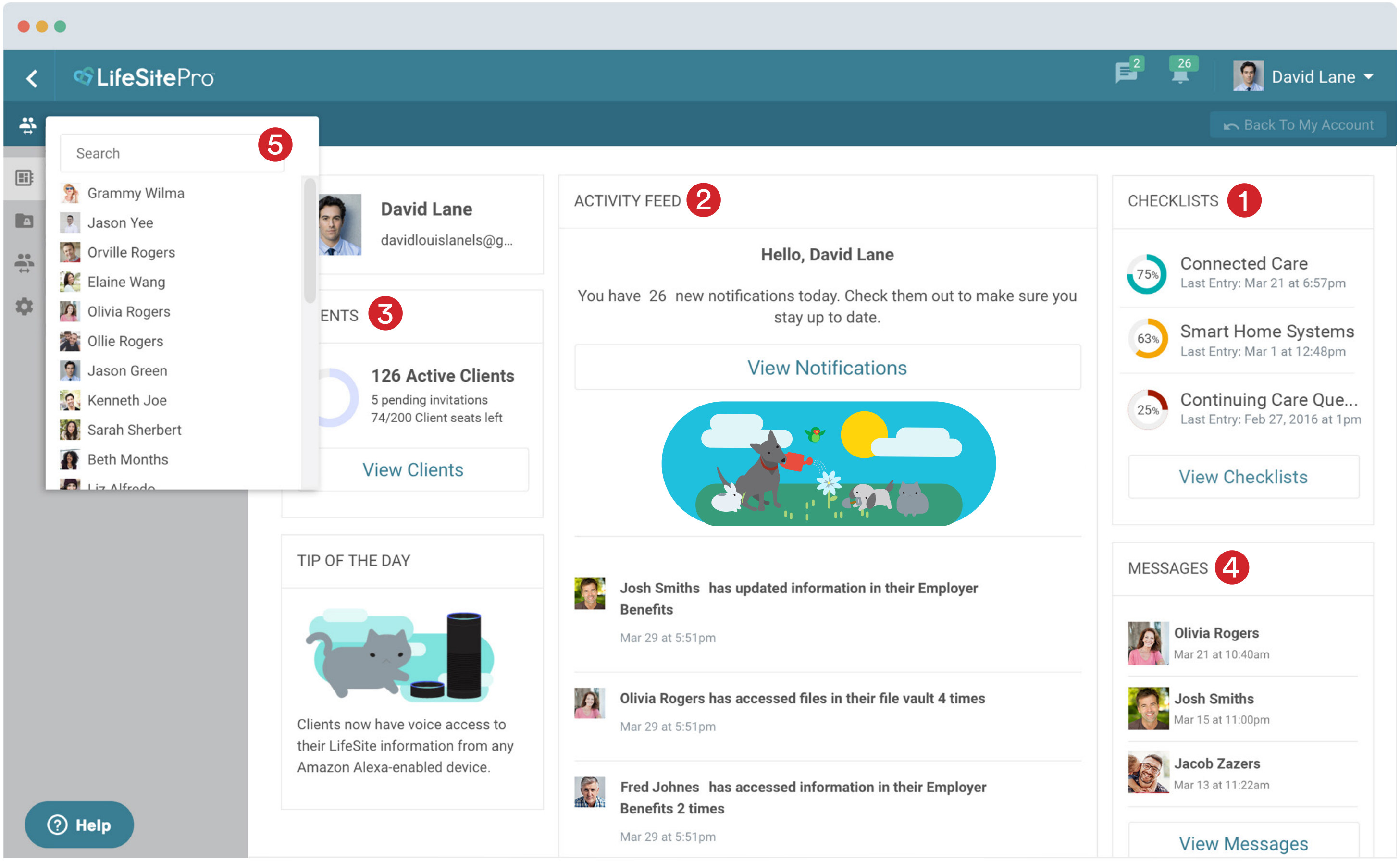
LifeSite™

Getting Started with LifeSite Pro

Engage clients on a multi-generational level by providing the secure digital tools they're familiar with.

Welcome to Your Dashboard



1. Life Checklists

Checklists help you first identify then save the files and information you'll need for all kinds of major life events.

2. Activity Feed

Up-to-date notifications allow you to proactively engage with clients by offering help and services when needed.

3. Client Directory

Add new clients and manage their contact information.

4. Message Center

Alert clients to important changes or action items with secure, real-time messages.

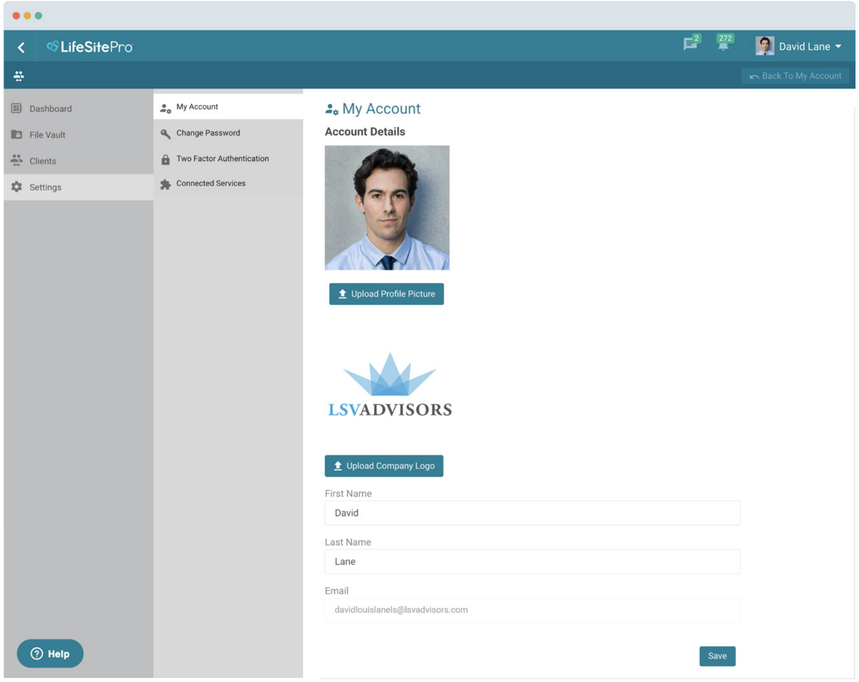
5. Client Access

Switch to your clients to view and manage their files and information.

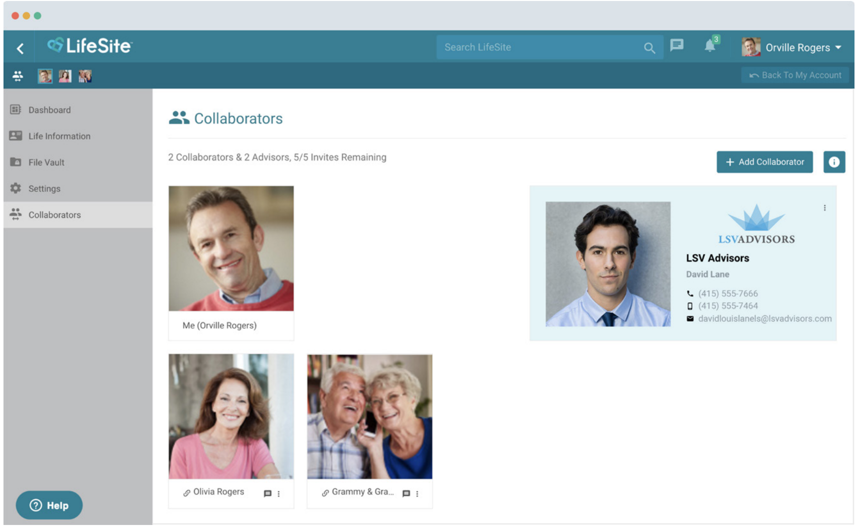
Upload Your Picture and Logo

Create Your Digital Business Card

Upload your profile picture and company logo to your LifeSite Pro account.



Your client will see your digital business card in their LifeSite Plus account.



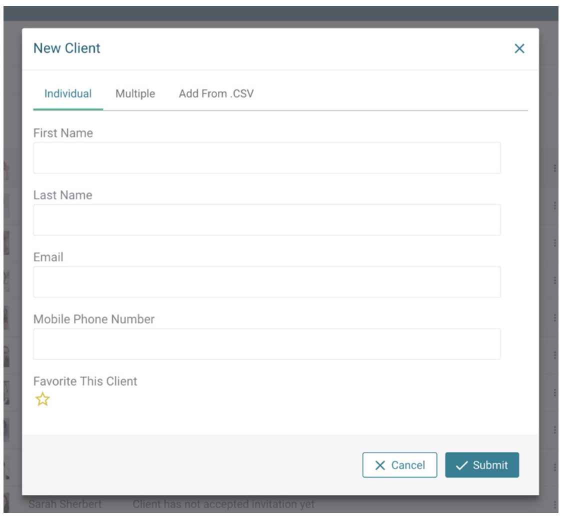
Onboard Your Clients

Step 1: Introduce LifeSite

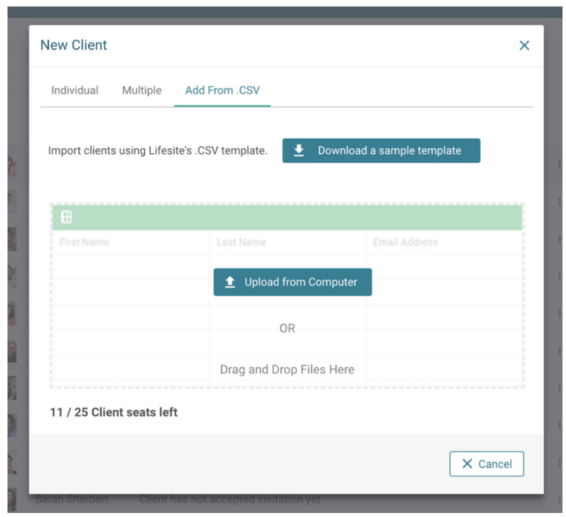
Call or email your clients ahead of time to let them know they'll be receiving a free invite to LifeSite Plus. If you're sending an email be sure to include the *Getting Started with LifeSite Plus* file.

Step 2: Invite Your Clients

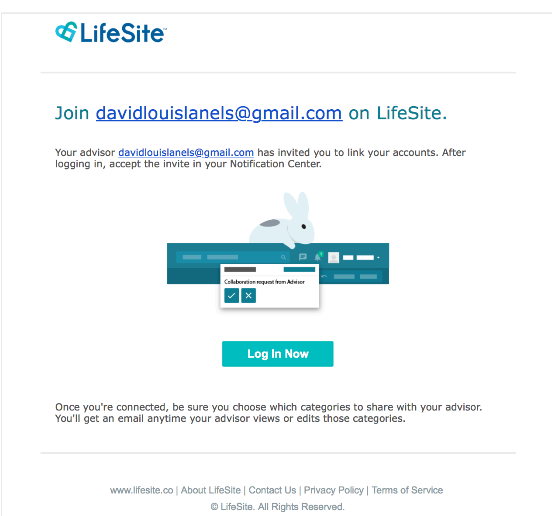
1. You'll just need their name and email address.



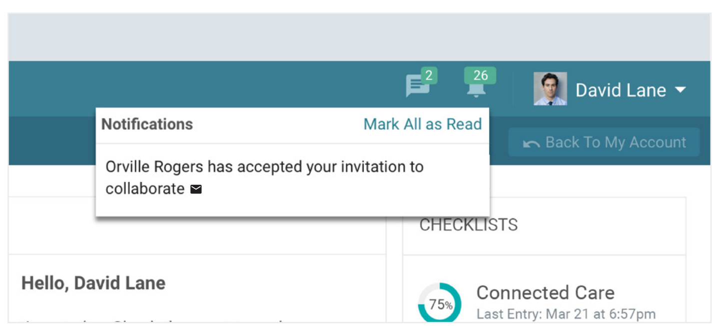
2. To invite multiple clients, first download the Sample Template.



3. Your clients will get an email invite to a free LifeSite Plus account.



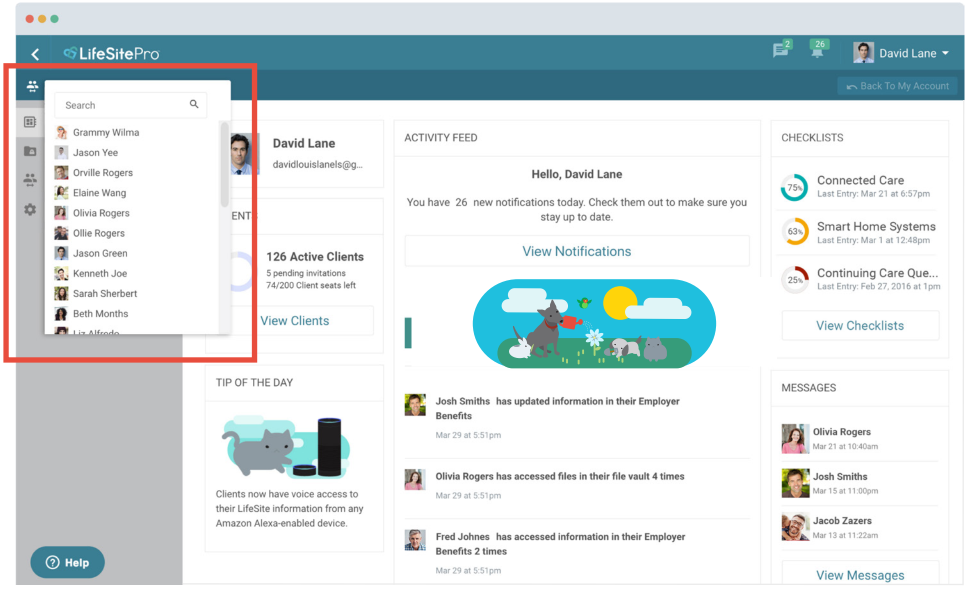
4. Once your client has accepted the invite, you'll get a notification.



Step 3: Start Collaborating

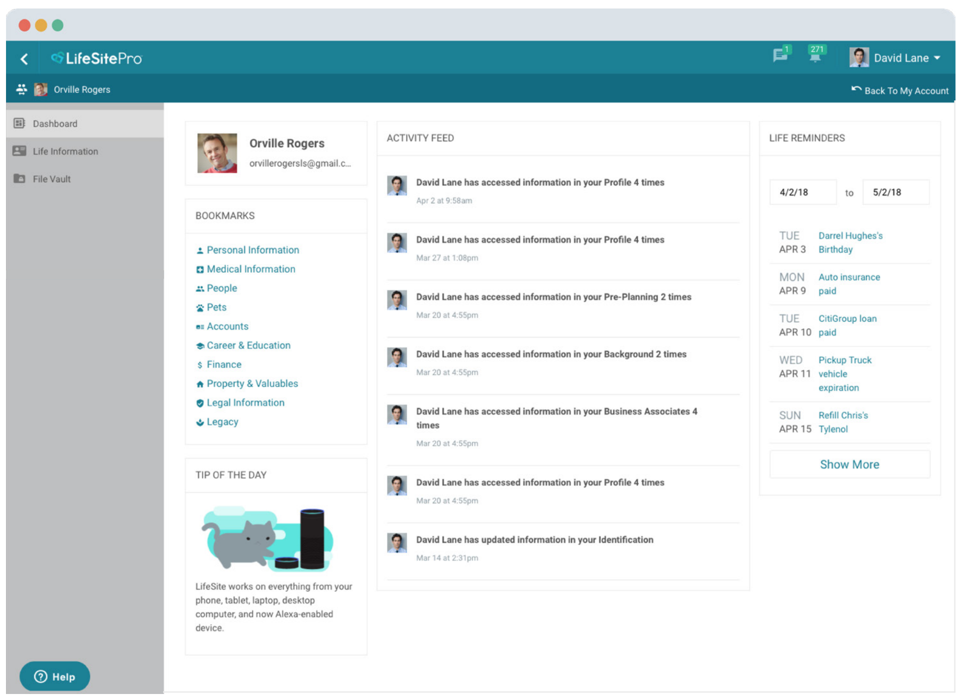
You now have access to some or all of your client's LifeSite Plus account.

Switch to your client to view and manage their files and information based on the permissions they set for you.



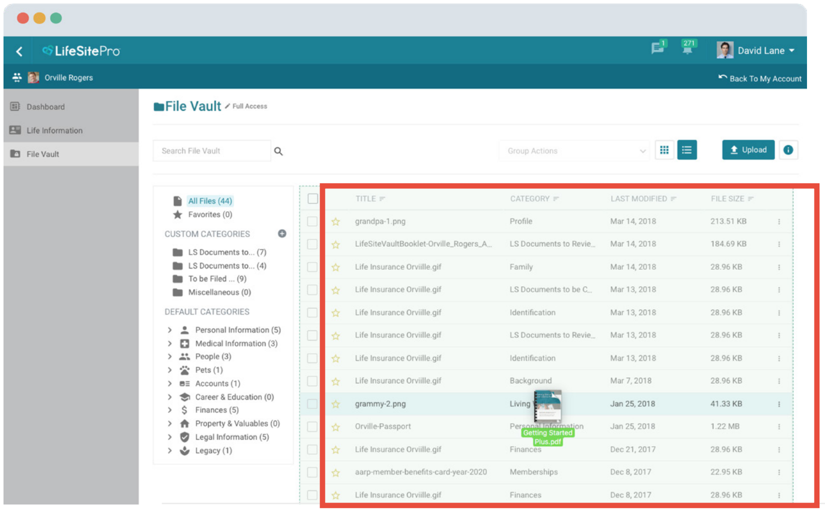
Step 4: Start Sharing

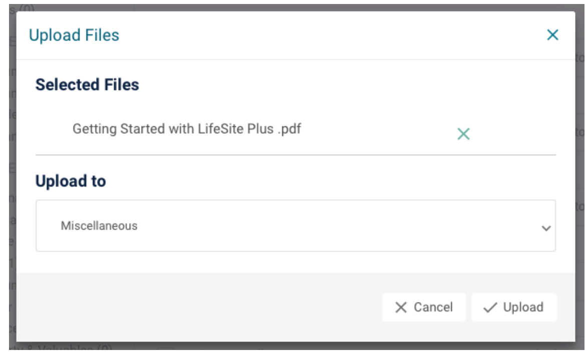
Based on your permissions, you can view or edit (or are blocked from) your client's files and information. Send your client a secure message if you require additional permissions.



Step 5: Upload File

Try it out! Save the *Getting Started with LifeSite Plus* file to your client's File Vault. Your client will get an email notifying them of this activity.





Step 6: Start Advising

You're all set! Send your client a secure message welcoming them to LifeSite along with the next steps you'd like them to take.