

# Financial Wellness

Take the first step in your journey to financial wellness



FORTUNE

AARP

amazon alexa Skills Challenge Winner

WINNER  
2017 Consumers' Choice  
INNOVATION@50+

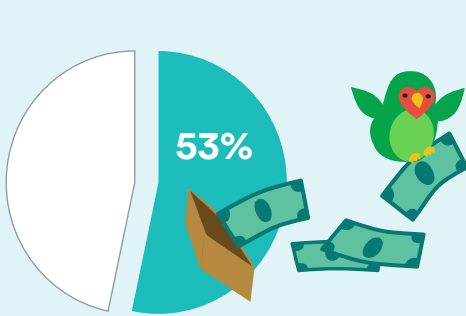
RED HERRING N. AMERICA  
100 WINNER



## Organize Your Most Important Information

LifeSite is an online safe deposit box that allows you to securely store, easily organize, and discretely share information and files with your loved ones and trusted advisors.

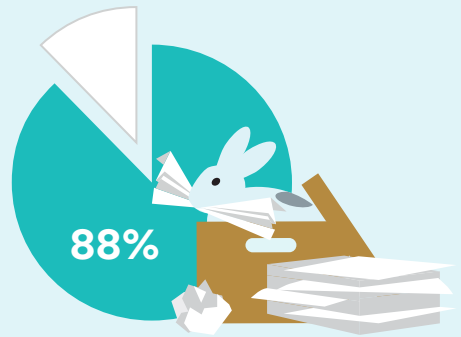
## Peace of Mind



**Financial worry** is the leading cause of stress for 53% of workers surveyed. Reduce stress by organizing, protecting and then privately sharing tasks with your team.

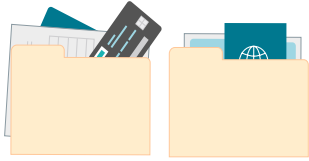


Secure real-time **collaboration** allows family, advisors, and other professionals to help manage and assist you with life and financial goals.



88% of adults store important documents in a file cabinet, folder or not at all. LifeSite protects your information from **natural disasters** and other emergencies.

## Modern Tool For Your Information



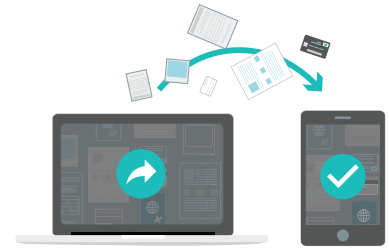
### Intuitive Organization

Dozens of predefined categories means you save valuable time entering and searching for your information in LifeSite.



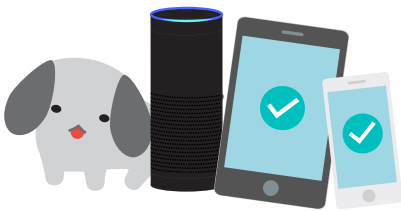
### Ownership

LifeSite is designed to ensure YOU own your information. That means no one else can see it - not LifeSite and certainly not your employer.



### Collaboration

Managing information is a team sport. Let family and trusted advisors help by giving them access to the information you choose.



### Mobile and Alexa Access

Free mobile app and Alexa skill to instantly access information during an emergency or to enter information on-the-go.

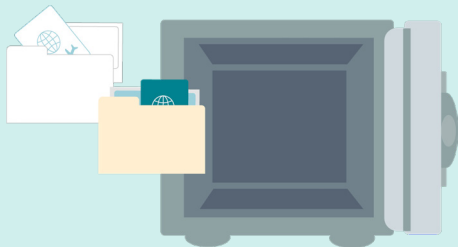


### Guided Checklists

Checklists are questions or tasks directly related to a life event. Track goals with your advisor or prepare for an upcoming trip.



## Security And Convenience



### Industry-Leading Security

No matter which device you use, multiple layers of privacy and security protocols constantly monitor and safeguard your information, keeping it encrypted, accessible, and secure at all times.



### User Only Access

LifeSite treats every user like their own company. Your data is locked with a unique encryption key that is constantly rotated and scrambled. Only YOU get to see your information – period.

