



Wilson Law Group, LLC

Your Life. Your Legacy. Your Way.TM

LEGALVAULT

Benefits and Access for Clients



INTRODUCTION

LegalVault allows Wilson Law Group to give you, our client, electronic access to your Estate Planning documents and Medical Directives. The service is convenient, secure, and completely safe for storing copies of your most valued documents.



By becoming a LegalVault member, you are empowered to keep track of and review your documents electronically outside of your annual/bi-annual estate planning meetings, control the amount of access your family or Trustee has, if any, and add any additional documents that you feel are necessary in case of emergency. You also allow your physicians and hospitals access to your Medical Directives at a moments notice.

BENEFITS

- **All uploaded information is encrypted for security**
- **Storage of Health Care Documents**
- **HIPAA compliant**
- **Easy access for medical professionals to access Health Care Documents**
- **Storage of Legal Documents**
- **Add your own documents such as Allergy Lists, Deeds, Special Instructions, etc...**
- **Access to an activity log to see who has logged in to your account**

HOW TO GET STARTED

To Begin:

1. You will receive a letter from us containing both your username and password after your trust signing. Have both ready:

2. Access LegalVault at (BEST OPTION)

www.wilsonlawgroup.com

or

Access LegalVault at www.legalvault.com

DO NOT GOOGLE for LegalVault, as many option will come up.

3. Enter your individual usernames and passwords. These can be found on the documents that came attached your LegalVault wallet card.

Access via wilsonlawgroup.com

The image shows two buttons for accessing LegalVault. The top button is labeled 'CLIENT LOGIN' and 'LEGALVAULT ACCOUNT' with a blue 'CLICK HERE TO ACCESS YOUR LEGALVAULT ACCOUNT' button below it. The bottom button is labeled 'HOSPITALS' and 'HEALTHCARE PROVIDERS' with a red 'CLICK HERE TO ACCESS PATIENT MEDICAL DIRECTIVES' button below it.

The image shows the LegalVault login form. It features the 'LEGALVAULT' logo and the tagline 'SECURE DOCUMENT STORAGE & EXCHANGE'. Below the logo are two input fields: 'User Name:' and 'Password:'. A 'Login' button is located at the bottom right of the form.

ONCE YOU ARE IN

You can click :

- “Your Settings” and then
- “My Account Information” and verify that all information listed for you is correct,

Your Settings Medical Legal / Financial

My Account Information Manage Access to my Account Review Access Log

My Contact Information

First Name

Last Name

Address 1

Address 2

City

State

Zip

Home Telephone

Mobile \ Alternate Phone

Date of Birth

Gender

Primary Email

You will want to click on

- “Manage Access to my Account”.
- This is where you will have the opportunity to customize your password

Your Settings Medical Legal / Financial

My Account Information Manage Access to my Account Review Access Log

Change Password

Old Password

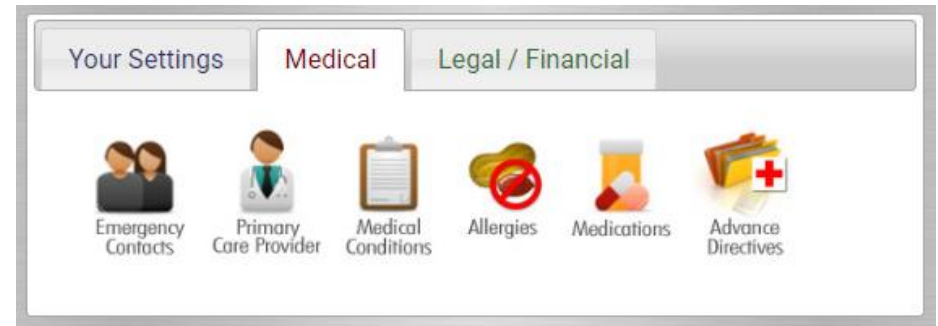
Please note: For better security, passwords are required to contain 8-16 characters, an uppercase letter (A-Z) and a lowercase letter (a-z) and a number (0-9).

New Password

New Password (confirmation)

MEDICAL

The Medical tab allows you to manage information about Emergency Contacts, Physicians, list any Medical Conditions that you have, as well as any allergies and medications. You can change the information listed when necessary or add to it at any time.



The “Advance Directives” tab allows you to review the health care planning documents from your Trust. The documents can be sorted by name or signing dates. The signing date is listed directly underneath each document for easy viewing.

To download these documents, click on the green box with the downward arrows.

The screenshot shows the 'Advance Medical Directives' section of the interface. It features a table with the following data:

Document Name	Location	Doc Date	Uploaded			
Anatomical Gift		03/16/09	11/08/10	✓	🔒	-
HIPAA Authorization		03/16/09	11/08/10	✓	🔒	-
Living Will		03/16/09	11/08/10	✓	🔒	-
Power of Attorney for Health Care		03/16/09	11/08/10	✓	🔒	-

MEDICAL

You have the ability to add information into the Medical Conditions, Allergies, and Medications sections. Each of these screens has drop-down options that can be used to put information in. You have the ability to add, edit, and remove information in these sections. The information added to these sections will be able to be seen by health care professionals when they access your account via the wallet card information.



Add Medical Condition

Information contained in this section will be made available to healthcare providers.

Please select a medical condition from the list or enter one below, where indicated.

Select Medical Condition

Medical Condition

Add Medication

Information contained in this section will be made available to healthcare providers.

Name of Medication

Dosage

Frequency

Add Allergy Information

Information contained in this section will be made available to healthcare providers.

Please select an allergy from the list below or enter one below, where indicated.

Select Allergy

Allergy Name

LEGAL/FINANCIAL

The Legal/Financial tab makes all of your Estate Planning Documents that are in your portfolio binder available to you.

The Legal/Financial tab has additional locations to store information that you may want to keep secure. For example: Assets, Advisors and their contact information, and Passwords to other sites that you frequently visit and want to keep safe.

****We do not upload your Trust Financial Statement****

A screenshot of a 'Passwords' management page. The title is 'Passwords'. Below the title is a paragraph: 'Your LegalVault™ account allows you to store important usernames and passwords for convenient retrieval.' There are four input fields: 'Location / Website', 'UserName', 'Password', and 'Password (again)'. A 'Save' button is located at the bottom right of the form.A screenshot of an 'Add Advisor' form. It has a dark header with the title 'Add Advisor'. Below the header are several input fields: 'Name', 'Advisor Type' (a dropdown menu currently showing 'Accountant'), 'Phone', 'Mobile', 'Email', and 'Notes' (a larger text area). A 'Save' button is at the bottom right.A screenshot of an 'Add Asset' form. It has a dark header with the title 'Add Asset'. Below the header is an 'Asset Type' dropdown menu which is open, showing a list of options: '[Select Asset Type]', '[Select Asset Type]', 'Bank Account', 'Brokerage Account', 'Life Insurance', 'Other', 'Private Entity', 'Real Estate', 'Retirement Account', and 'Safety Deposit box'. A 'Save' button is visible to the right of the dropdown.

LEGAL/FINANCIAL

Access to the Legal/Financial portion of this site is only available to those you give your username and password to. Health Care providers cannot access this when reviewing the Medical portion of your documents.

You have the ability to upload any additional documents you would like to have online access to.

To Download documents, click on the green box with the downward arrows.

Upload Documents

Upload document(s)

To select multiple files, hold down the CTRL key and then click the files you want to select.

Legal / Financial Documents

<u>Document Name</u>	<u>Location</u>	<u>Doc Date</u>	<u>Uploaded</u>			
Anatomical Gift - John		06/14/14	08/23/18	✓	🔒	✏️
Assignment of Personal Property - John		06/14/14	08/23/18	✓	🔒	✏️
Assignment of Personal Property - Mary		06/14/14	08/23/18	✓	🔒	✏️
Authorization for Final Disposition - John		06/14/14	08/23/18	✓	🔒	✏️
Authorization for Final Disposition - Mary		06/14/14	08/23/18	✓	🔒	✏️
Certificate of Trust		06/14/14	08/23/18	✓	🔒	✏️
Comprehensive Transfer Document		06/14/14	08/23/18	✓	🔒	✏️
Durable Power of Attorney - John		06/14/14	08/23/18	✓	🔒	✏️
Durable Power of Attorney - Mary		06/14/14	08/23/18	✓	🔒	✏️
Durable Power of Attorney to Fund - John		06/14/14	08/23/18	✓	🔒	✏️
Durable Power of Attorney to Fund - Mary		06/14/14	08/23/18	✓	🔒	✏️
Emergency Instructions		06/14/14	08/23/18	✓	🔒	✏️
HIPAA Authorization - John		06/14/14	08/23/18	✓	🔒	✏️
HIPAA Authorization - Mary		06/14/14	08/23/18	✓	🔒	✏️
Last Will - John		06/14/14	08/23/18	✓	🔒	✏️
Last Will - Mary		06/14/14	08/23/18	✓	🔒	✏️
Living Will - John		06/14/14	08/23/18	✓	🔒	✏️
Living Will - Mary		06/14/14	08/23/18	✓	🔒	✏️
Marital Property Agreement		06/14/14	08/23/18	✓	🔒	✏️
Memorandum for Distribution		06/14/14	08/23/18	✓	🔒	✏️
Power of Attorney for Health Care - John		06/14/14	08/23/18	✓	🔒	✏️
Power of Attorney for Health Care - Mary		06/14/14	08/23/18	✓	🔒	✏️
Remembrance and Services Memorandum - John		06/14/14	08/23/18	✓	🔒	✏️
Remembrance and Services Memorandum - Mary		06/14/14	08/23/18	✓	🔒	✏️
Sample Living Trust	Safe @ home	06/14/14	08/23/18	✓	🔒	✏️

FAQ'S

➤ **How often will documents be updated?**

Estate Planning Documents will be updated with their current counterparts every time that you come in for your RWay meeting – every 1-2 years depending on your membership option.

➤ **When is it time to update?**

You may update one time per your RWay membership period – anytime a document has changed, we will handle updating your LV account so that you always have the most current and valid documents uploaded.

➤ **What do you do if your doctor can't access them?**

You should contact Wilson Law Group (**best option**) at 608-833-4001, LegalVault at 877-269-0076, or copy the documents from your Trust binder.

➤ **Why is it important to check the documents ahead of an emergency?**

To be sure that you have everything readily available for your physician.



FAQ'S

➤ **Who besides your doctor should have access to your LegalVault?**

Anyone who you feel needs to be able to access this information (spouse, trustee, healthcare agents, power of attorney, etc.).

➤ **What additional information is it important for you to add to LegalVault?**

You should be adding anything you want your health care provider to know, as well as any personal information you want kept in one secure location.

➤ **How long does LV keep your information?**

LegalVault will continue to keep your documents as long as you continue to renew; whether it be as part of RWay or on your own.

➤ **What happens to your LV account if you don't renew with RWay**

If you should decide not to renew with Rway, you do have the option of renewing with LV independently, otherwise your documents will be deleted after 90 days.

If you should decide to renew independent of Wilson Law Group, then you would have to login to access your accounts directly through the LV site, you wouldn't be able to go through our website.



FAQ'S

➤ **What is the cost of renewing independently?**

Currently the costs are as follows (per individual):

1 year = \$45

3 years = \$95

5 years = \$145

7 years = \$99 (best value)

➤ **Will LegalVault contact you to renew?**

No - During this time you should have your scheduled RWay meeting, in which case we will handle the renewal for you.

➤ **Why is Wilson Law Group offering this service?**

LegalVault offered a unique way of storing not only your Medical Directives, but a broader selection of Legal documents - Security was imperative to us while researching services, and LV has the highest level - They continue to advance their features and make it even more user-friendly - Accessibility for clients, physicians, trustees, etc...was beyond measure.

STILL HAVE QUESTIONS?

Contact an RWay Team Member

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Thank You for Watching!

