

TRUSTLOCK A TO Z

01.

DocCreator™

02.

VideoWishes™

03.

DocLock™

04.

CloudDoc™

05.

LawReview™

TRUSTLOCK A TO Z

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www.TrustLockUSA.com

TrustLock A to Z.

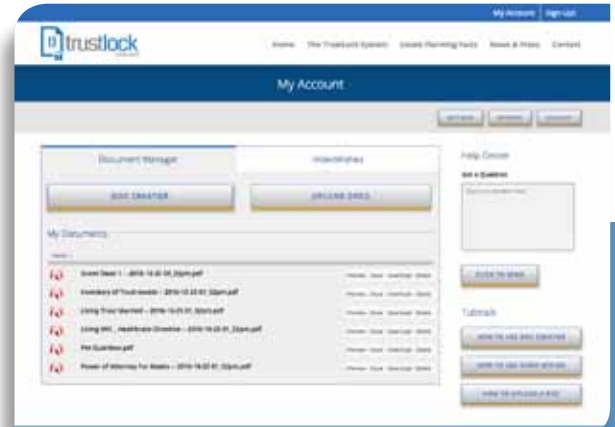
This guide will be your reference for mastering the TrustLock system and all it's features.

The TrustLock system is flexible

Our system allows you to create documents from within TrustLock by using "DocCreator. You can create all your essential estate planning documents by filling out a single form. Once your documents are completed they are stored and locked in your individual TrustLock account accessible only by you.

You can also load digital documents you may have by using the TrustLock "Upload Docs" or "DocAssist" features. These features allow you upload and store documents along side any documents you create in DocCreator. Some of these documents may include legal and financial documents such as Marriage, Birth & Death Certificates, Insurance Policies & Beneficiary Designations, Appraisals of Personal Property, Prescription & Allergy Information, Deeds & Mortgages, Business Records, Personal & Business Tax Returns, and Military Service Records.

To enhance your estate planning experience we have created "VideoWishes". The VideoWishes feature allows you to capture your true thoughts and feelings about critical issues involving your estate, your death or the type of medical care you wish to have administered in your last days. This feature rounds out the TrustLock membership and makes sure your estate planning decisions leave no room for outside interpretation.



A Brief Overview of TrustLock.

Over 25 Years of Experience in Estate Planning

TrustLock USA's estate planning attorneys have created the TrustLock Estate Planning documents based upon over twenty-five years of experience in the estate planning and ElderCare field. The TrustLock experience you will have will be based upon decades of legal experience and the examination and preparation of thousands of Trusts, Powers of Attorneys, Living Wills and related estate documents. The documents that come standard with the TrustLock system are based on this experience.



DocCreator

If you are starting your estate planning experience for the first time, DocCreator is the place to start.

Before starting DocCreator it is recommended you gather all the necessary and relevant information in advance needed to complete the DocCreator form.

This information includes:

Personal Information

- Your name
- Spouse's name *(if applicable)*
- Your address of residency

Children Information *(if applicable)*

- Names and birth dates of children

Pet Information *(if applicable)*

- Names of pets and desired pet guardians

Inventory of assets Information *(if applicable)*

- Bank, Investment, and Savings Accounts institution names and account numbers
- Life Insurance institution names and policy numbers
- Personal Property Description name and intended donee
- Real Estate addresses and legal descriptions

Once you have gathered this information it is time to fill out the "DocCreator" form.

DocCreator Standard Documents

DocCreator comes standard with the following documents:

- Living Trust (Single or Married)
- Living Will / Healthcare Directive
- Pet Guardian
- Power of Attorney for Assets
- Real Property Deed(s)
- Trust Funding Instructions
- Directive to Successor Trustee
- Abstract of Trust

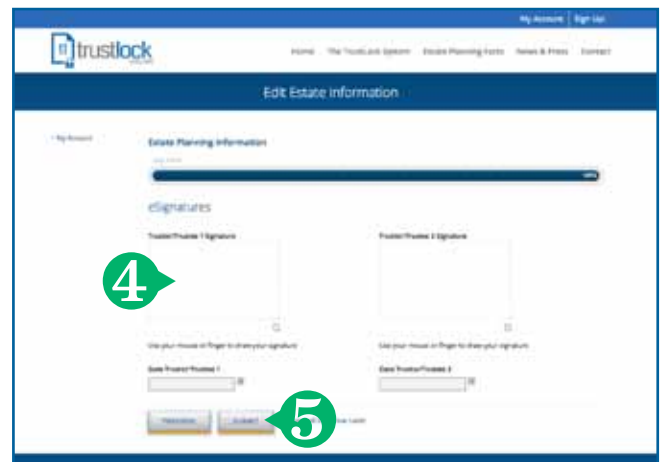
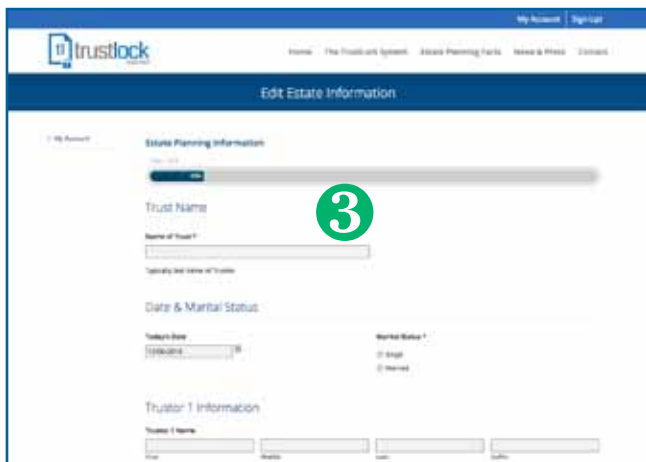
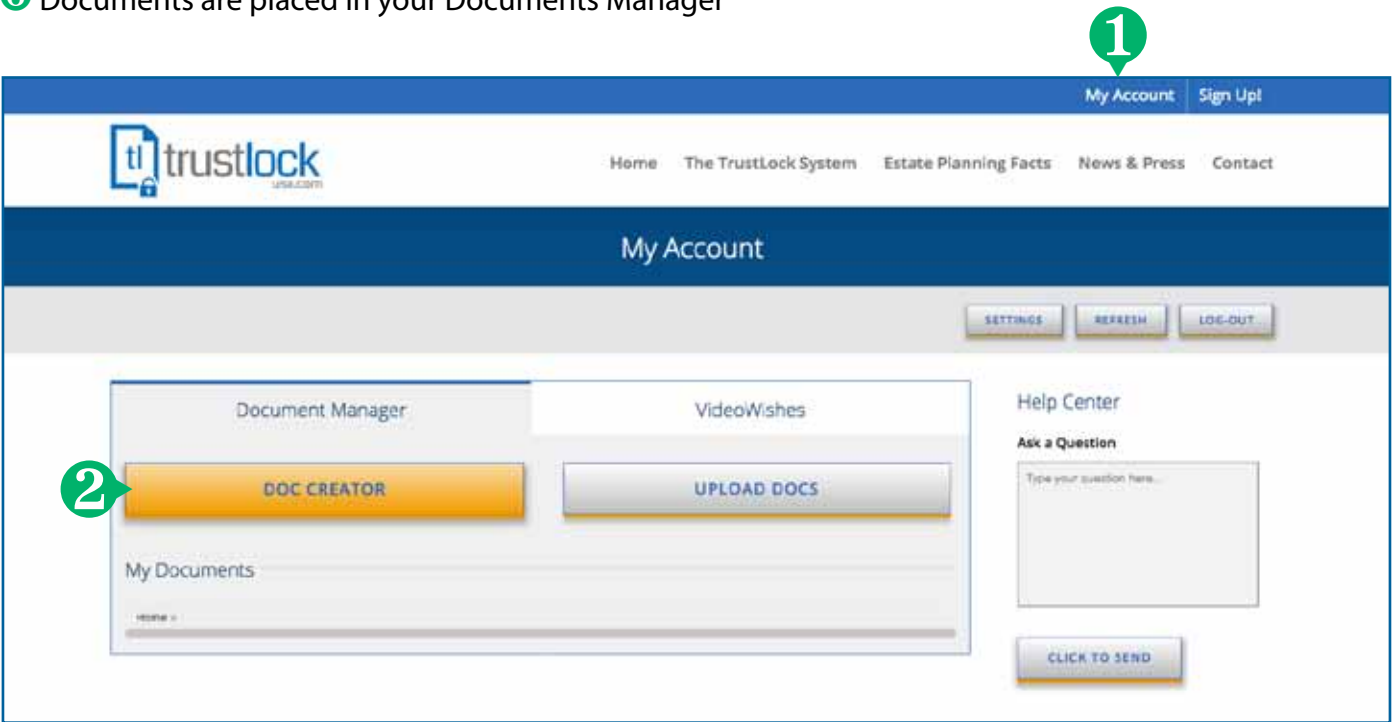
About Real Property Deeds

Once Real Property Deeds are created in DocCreator, they will need to be printed and recorded with the County recorders office. After Real Property Deeds are completed they can be uploaded to the My Documents section of the dashboard using either "Upload Docs" or our "DocAssist" programs explained in the next section.

DocCreator ...continued

These are the steps for using the "DocCreator" feature:

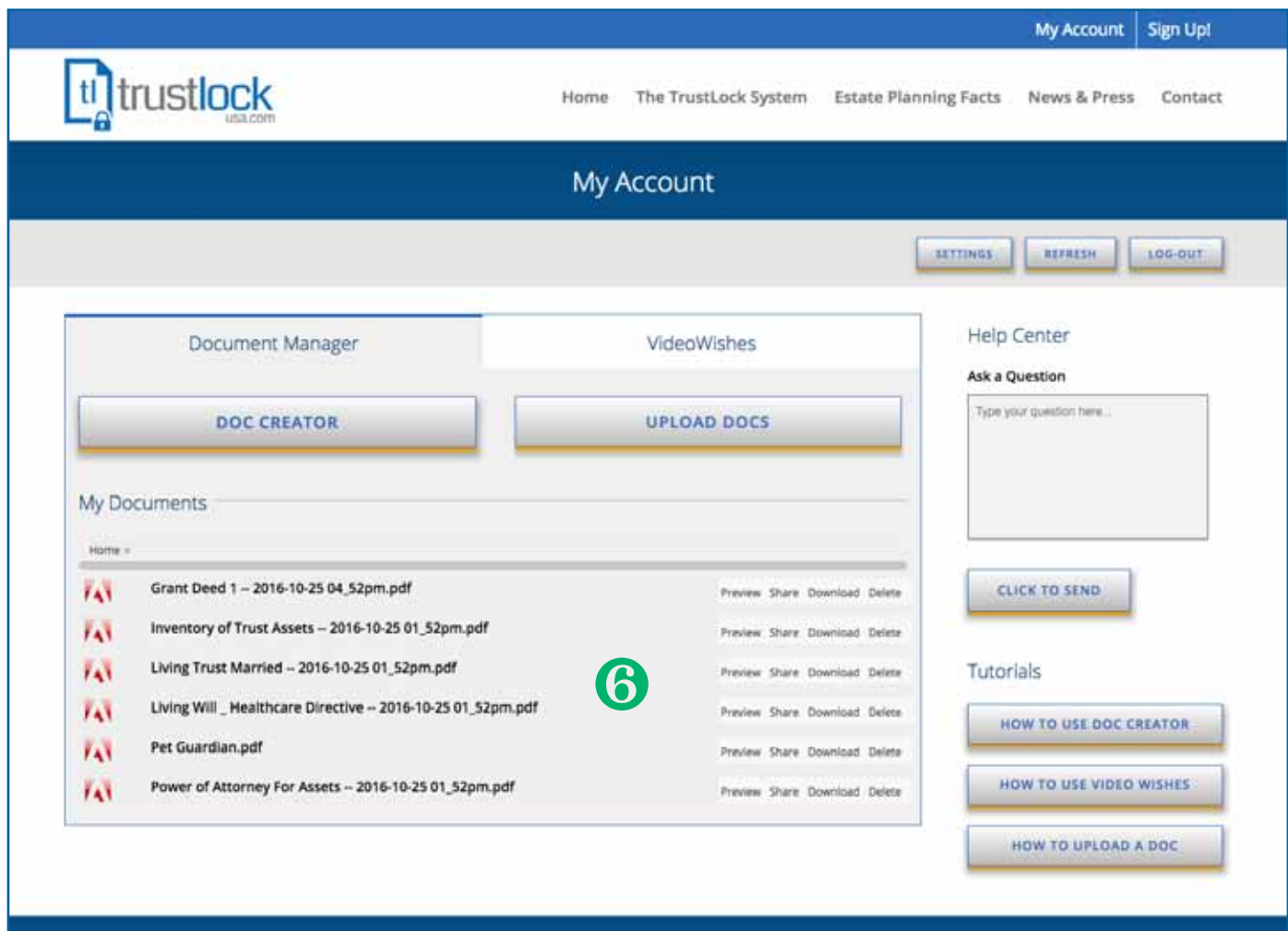
- 1 Go to your TrustLock dashboard
- 2 Click on the "DocCreator" button
- 3 Fill out the "DocCreator" form
- 4 eSign and date the final form screen
- 5 Click on the "Submit" button
- 6 Documents are placed in your Documents Manager



DocCreator ...continued

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The screenshot shows the TrustLock USA 'My Account' dashboard. At the top right, there are links for 'My Account' and 'Sign Up!'. The main navigation bar includes 'Home', 'The TrustLock System', 'Estate Planning Facts', 'News & Press', and 'Contact'. Below this, the 'My Account' section features 'SETTINGS', 'REFRESH', and 'LOG-OUT' buttons. The dashboard is divided into two main panels: 'Document Manager' and 'VideoWishes'. The 'Document Manager' panel contains a 'DOC CREATOR' button and an 'UPLOAD DOCS' button. Below these is a 'My Documents' section with a list of documents. The first document is 'Grant Deed 1 -- 2016-10-25 04_52pm.pdf'. The second document is 'Inventory of Trust Assets -- 2016-10-25 01_52pm.pdf'. The third document is 'Living Trust Married -- 2016-10-25 01_52pm.pdf', which has a green circle with the number '6' overlaid on it. The fourth document is 'Living Will _ Healthcare Directive -- 2016-10-25 01_52pm.pdf'. The fifth document is 'Pet Guardian.pdf'. The sixth document is 'Power of Attorney For Assets -- 2016-10-25 01_52pm.pdf'. Each document entry has a 'Preview', 'Share', 'Download', and 'Delete' link. To the right of the dashboard is a 'Help Center' section with an 'Ask a Question' form and a 'CLICK TO SEND' button. Below the 'Help Center' is a 'Tutorials' section with three buttons: 'HOW TO USE DOC CREATOR', 'HOW TO USE VIDEO WISHES', and 'HOW TO UPLOAD A DOC'.

Upload Docs

The TrustLock “Upload Docs” feature is perfect for any existing or supporting documents related to your estate plan that you have in digital form on your personal devices such as home computer, tablet or smart phone. If you need assistance from TrustLock in getting documents into your account, we offer DocAssist which is explained in the next section.

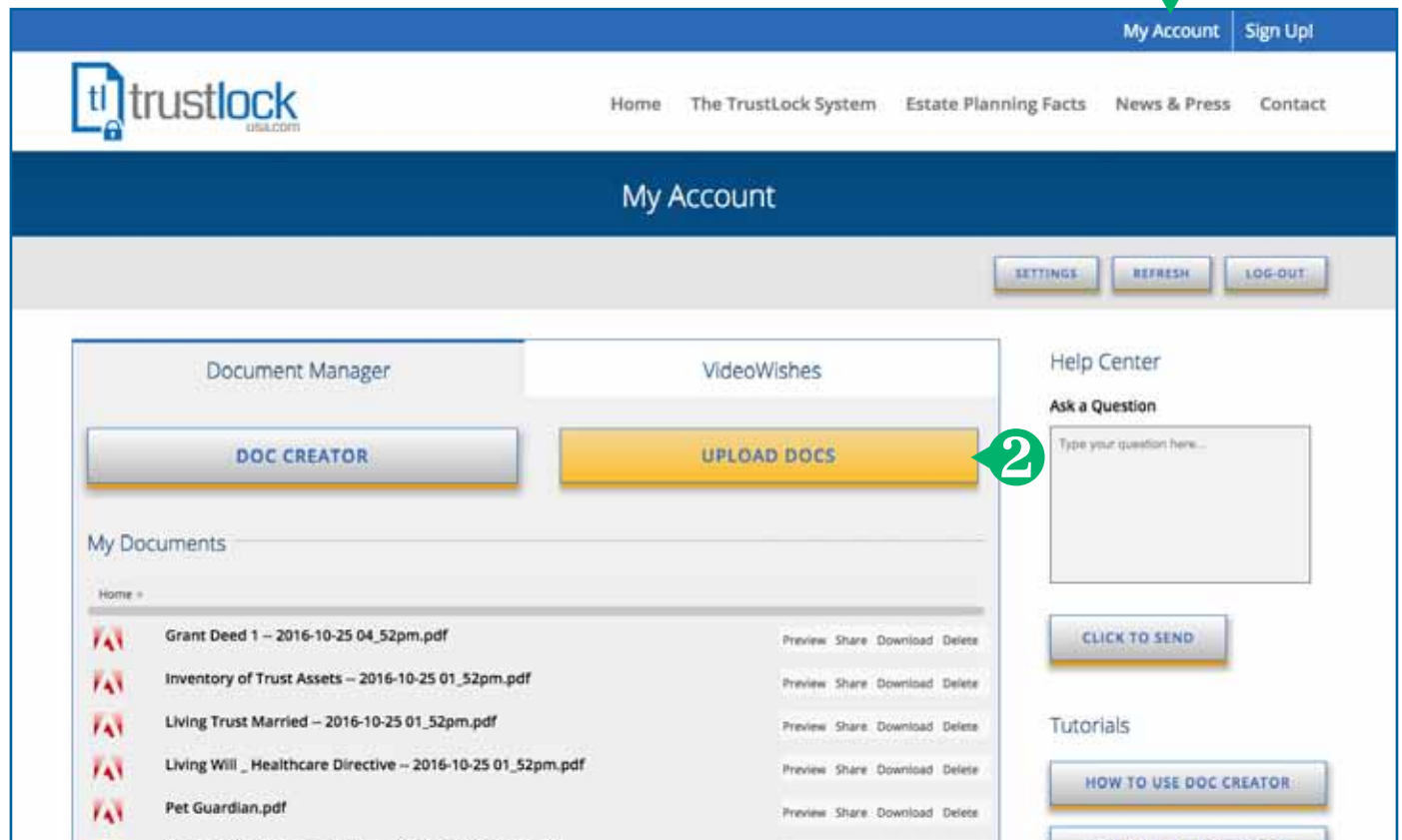
These are the steps for using the “Upload Docs” feature:

- 1 Go to your TrustLock dashboard
- 2 Click on the “Upload Docs” button
- 3 Browse your computer and select the digital documents you wish to upload
- 4 Click on the “Upload” button
- 5 Forms are automatically placed in the “My Documents” section of the dashboard

The dashboard displays all the documents you have created and uploaded with options to:

- **Preview:** displays that specific document right on your devices screen
- **Share:** generates a private web address that you can email to anyone for viewing
- **Download:** allows you to download any document directly to your device
- **Delete:** allows you to delete a specific document

1



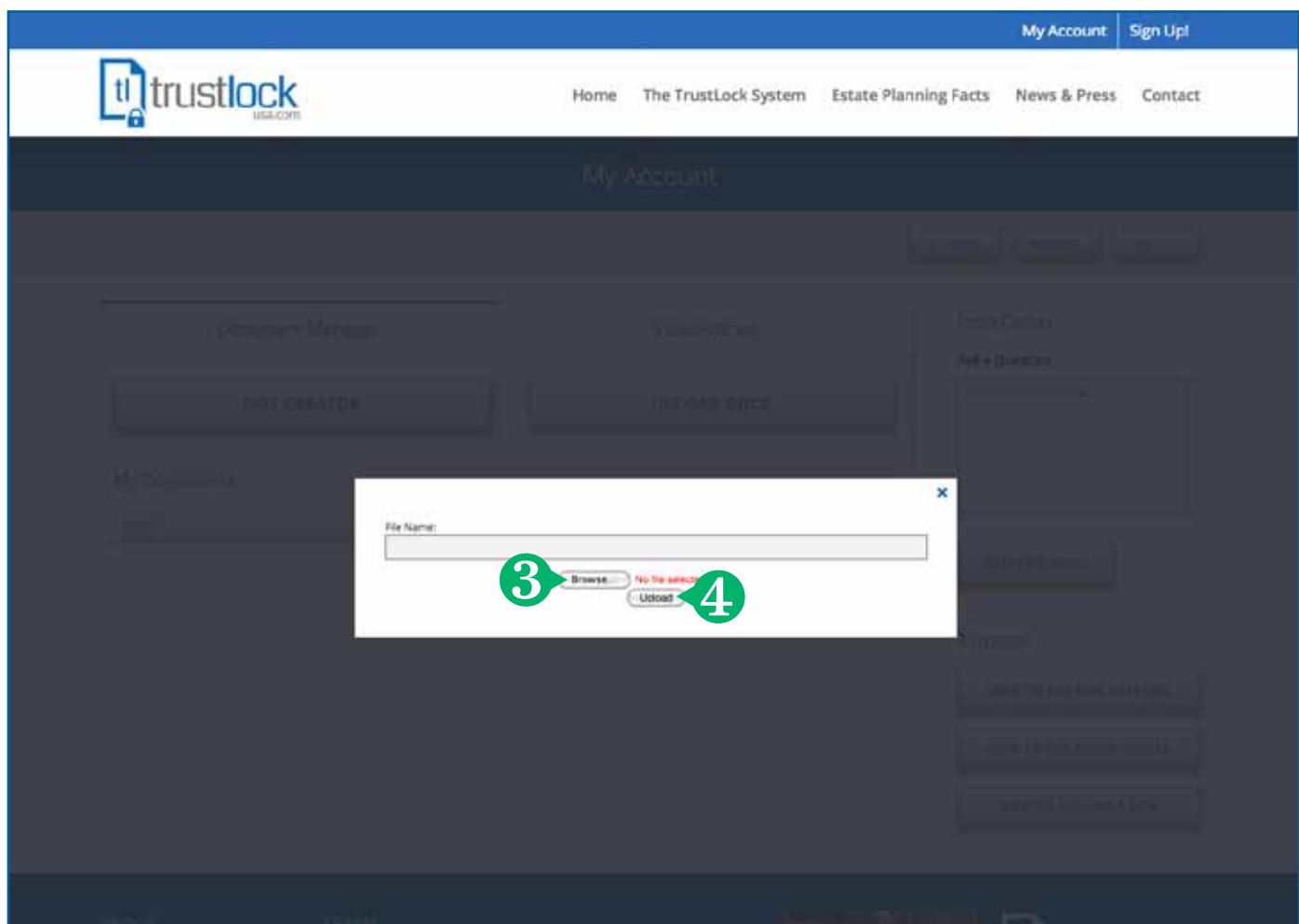
Upload Docs *...continued*

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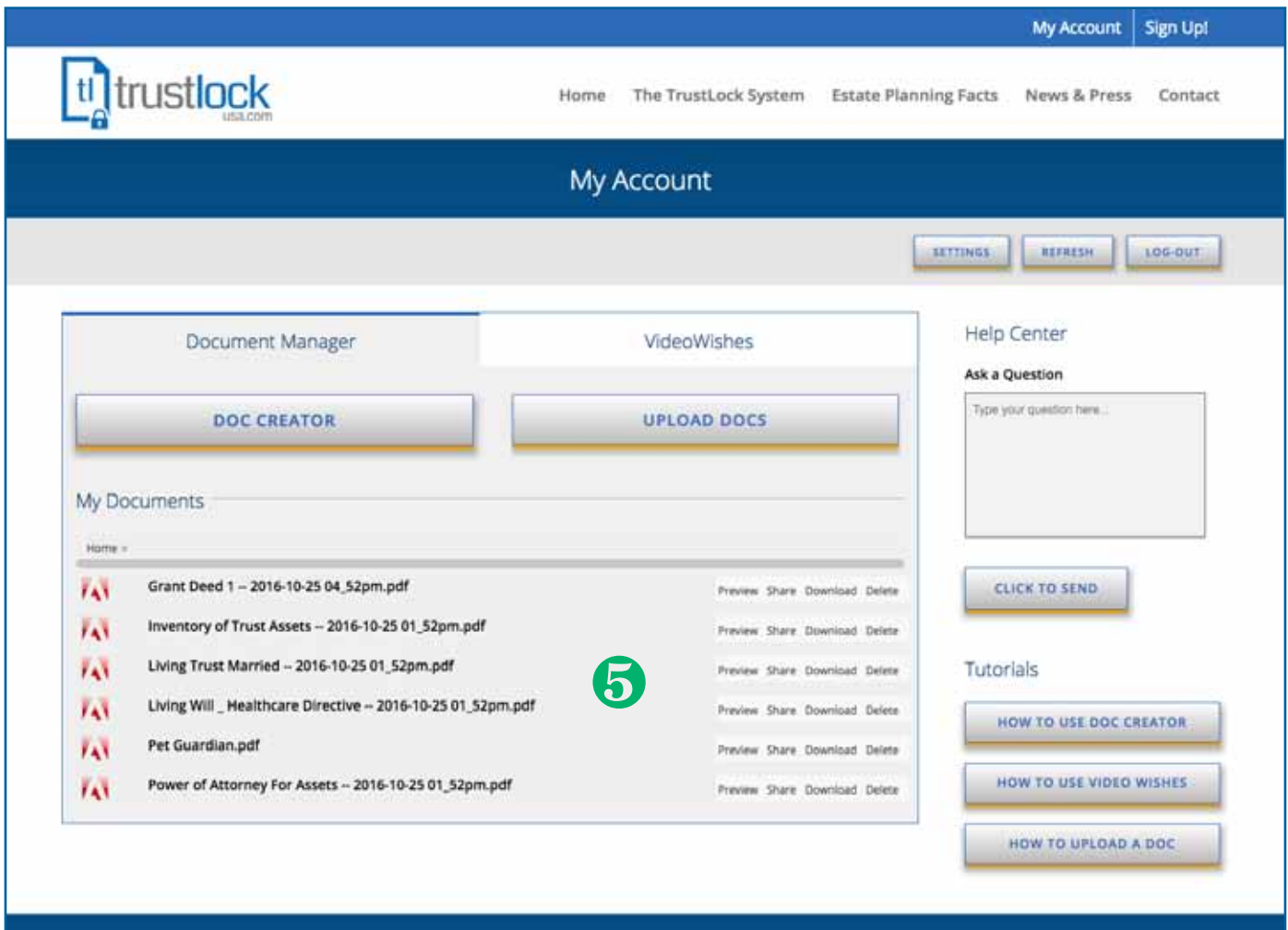
Upload Docs *...continued*

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DocAssist

TrustLock provides an alternative solution for Upload Docs called DocAssist. We understand that the world of digital documents can be confusing and frustrating at the same time. Because of this we allow you FAX or email documents directly to our office which we can load directly into your dashboard for you.



Send by eFax

FAX: 949-209-4919

Send a secure Fax directly to TrustLock with the following number: **949-209-4919**. Be sure to include your name and TrustLock membership number with the Fax so we can load your documents to the appropriate account.



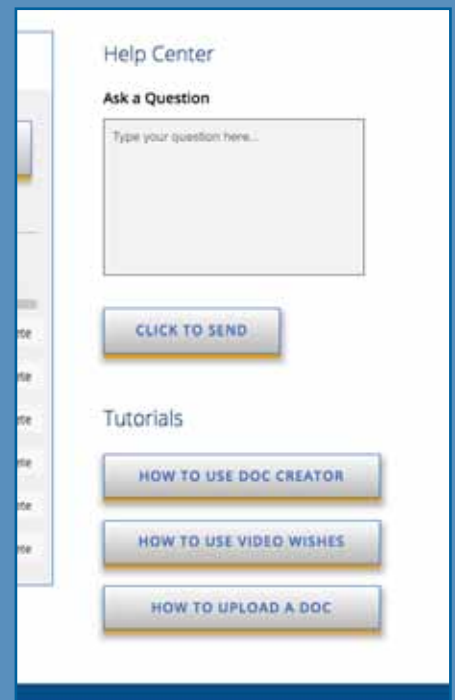
Send by Email

Email: docs@trustlockusa.com

You can email documents directly to us for loading into your TrustLock account by send files to docs@trustlockusa.com. Please include your name and account number with the email so we can load your documents to the appropriate account.

Help

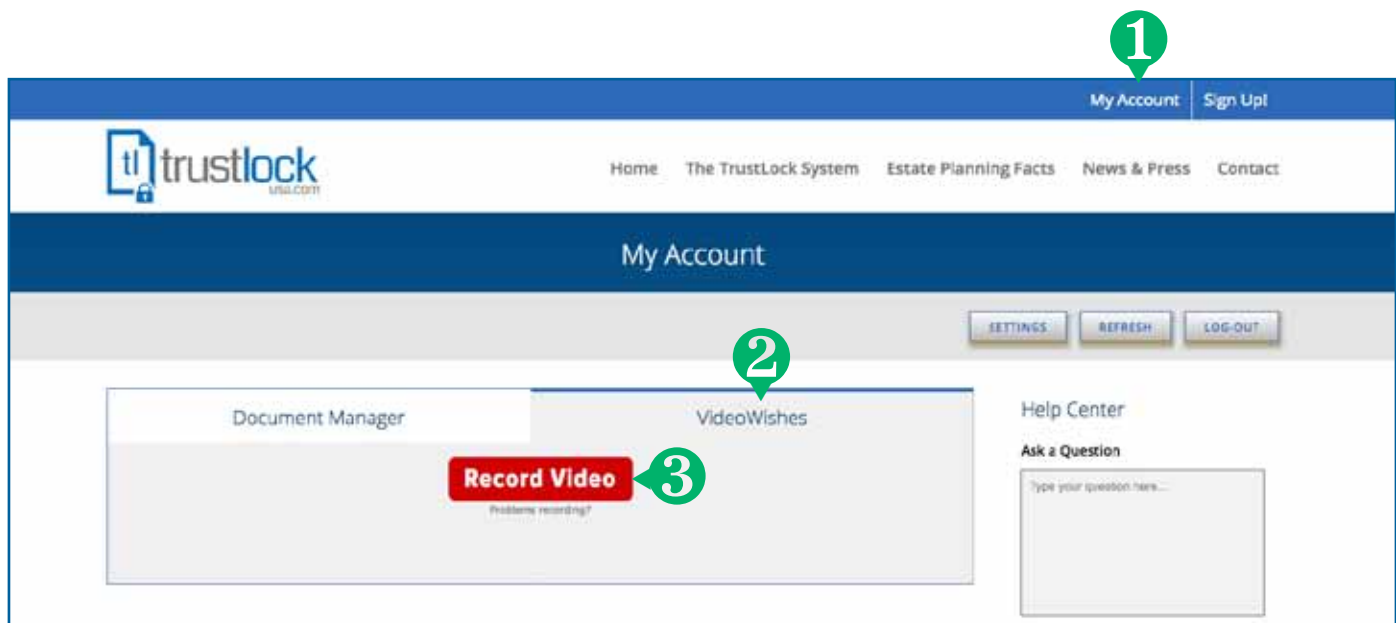
In your TrustLock dashboard there is also a help section on the right that allows you to quickly send questions by email directly to the TrustLock team. The "help" section also provides step by step instructions on using the features of your TrustLock account.



VideoWishes

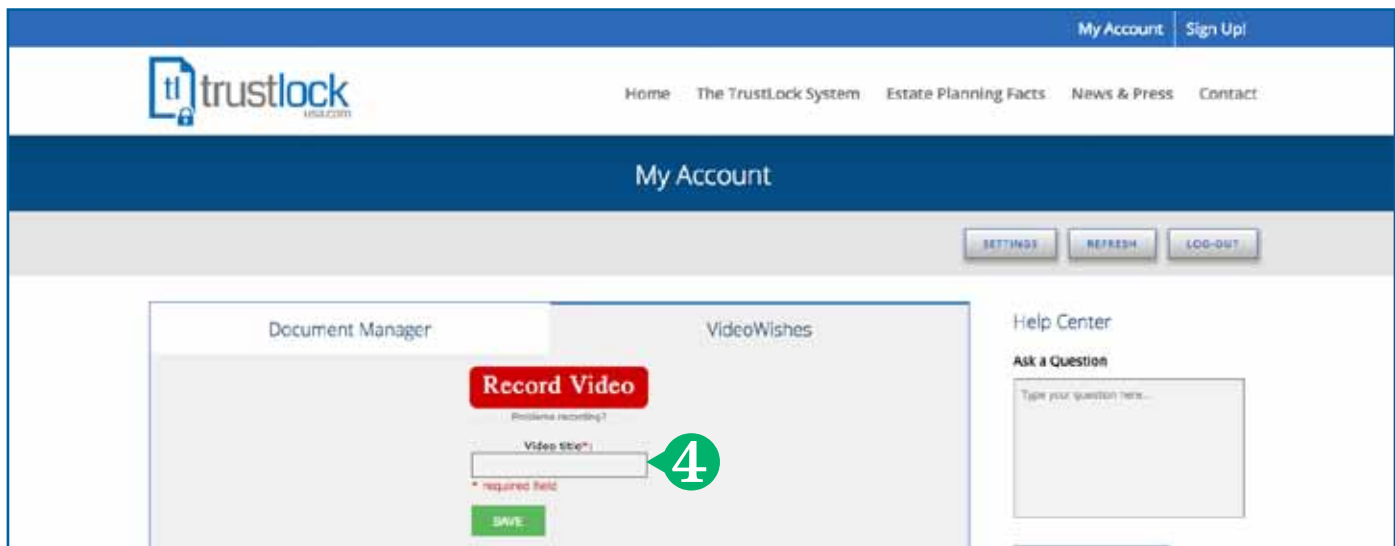
These are the steps for using the “VideoWishes” feature:

- 1 Go to your TrustLock dashboard
- 2 Click on the “VideoWishes” tab to the right of the Document Manager tab.
- 3 Click on the “Record Video” button
- 4 Name your video and click “ok”
- 5 In the video screen area click on the “Allow” button.
 - At this point your devices camera is activated so you can view yourself on your devices screen
- 6 To start recording video and sound, click on the “Record” button in the pop up window.
 - At this point you can start speaking directly into your device.
- 7 Once you are finished, click on the “Stop” button.
- 8 At this point you have 3 options:
 - **Play:** allows you to view what you have just recorded
 - **Retake:** allows you to replace what you have just recorded
 - **Save:** allows you to save the video directly into your “VideoWishes” section of the dashboard
- 9 Click “OK” in the confirmation pop up
- 10 The VideoWishes dashboard displays all the videos you have created with options to:
 - **Play:** plays that specific video right on your devices screen
 - **Share:** generates a private web address that you can email to anyone for viewing
 - **Download:** allows you to download any video directly to your device

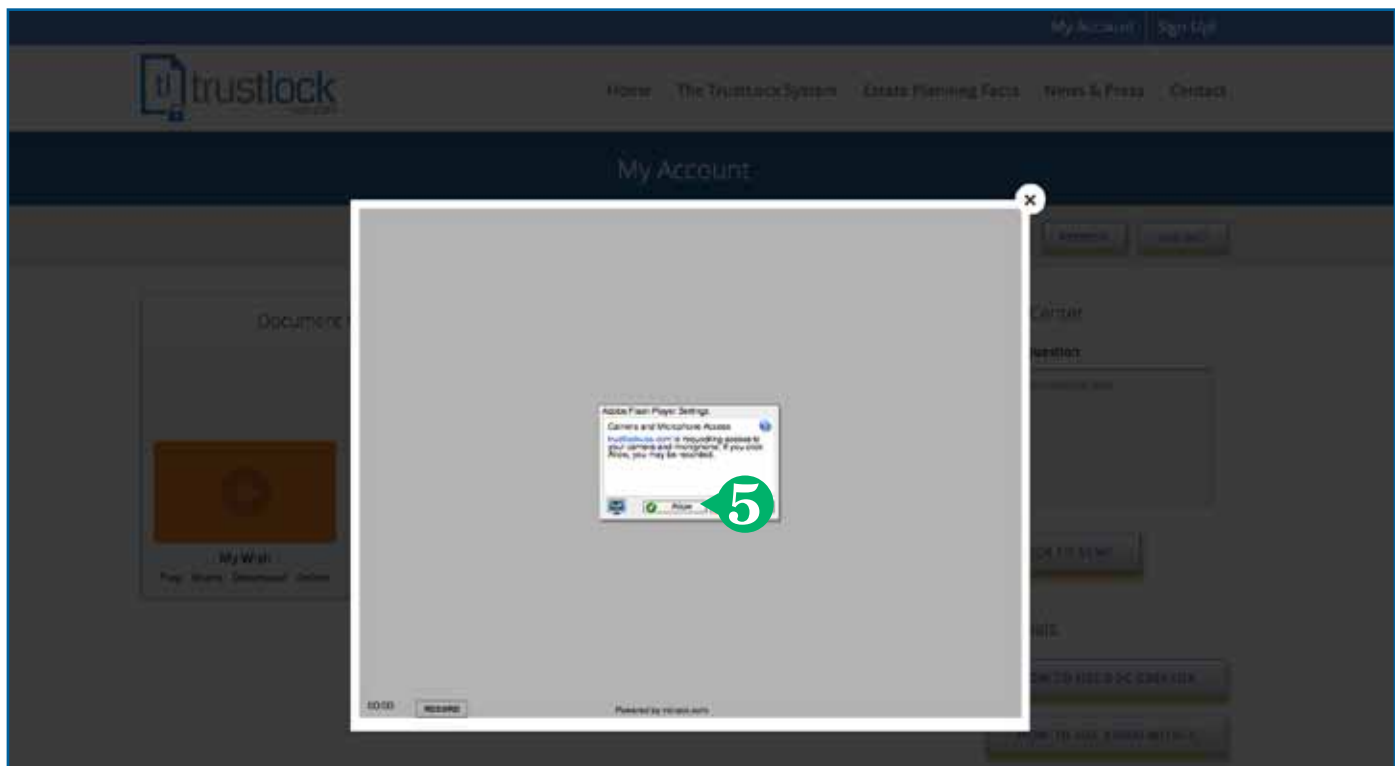


VideoWishes ...continued

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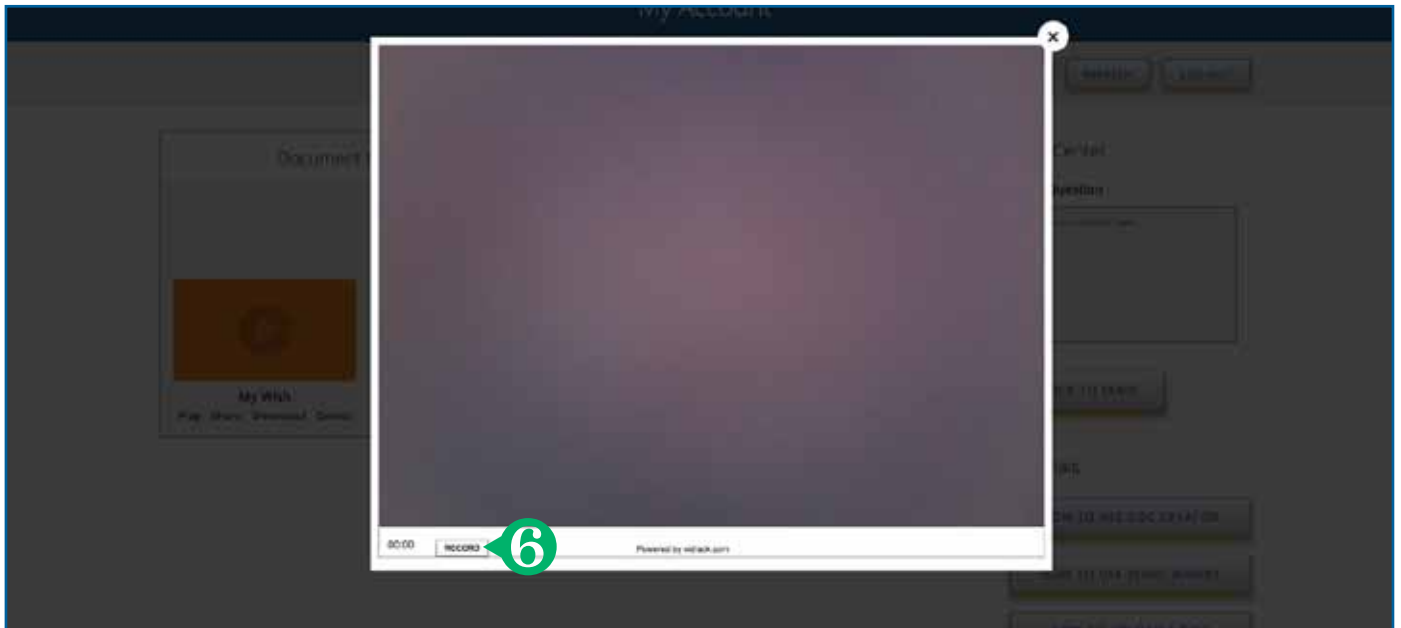


- 5 In the video screen area click on the "Allow" button.
- At this point your devices camera is activated so you can view yourself on screen

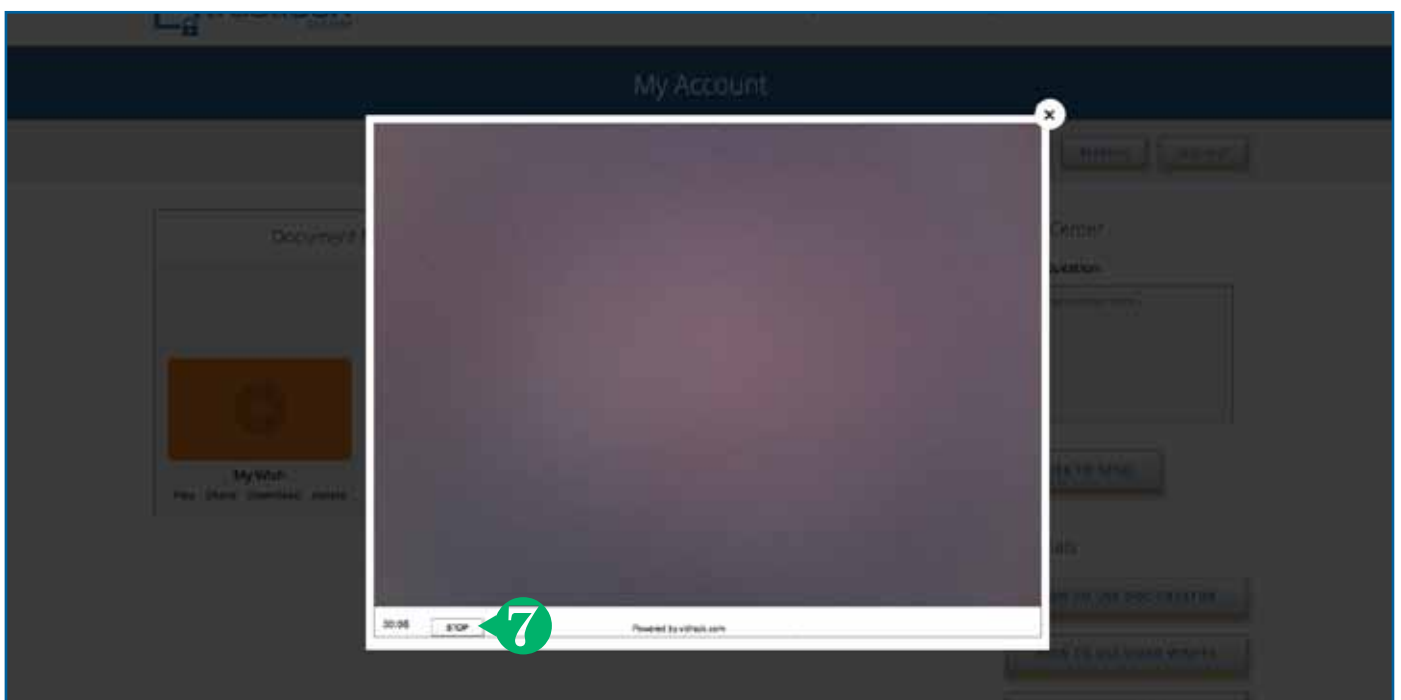


VideoWishes ...continued

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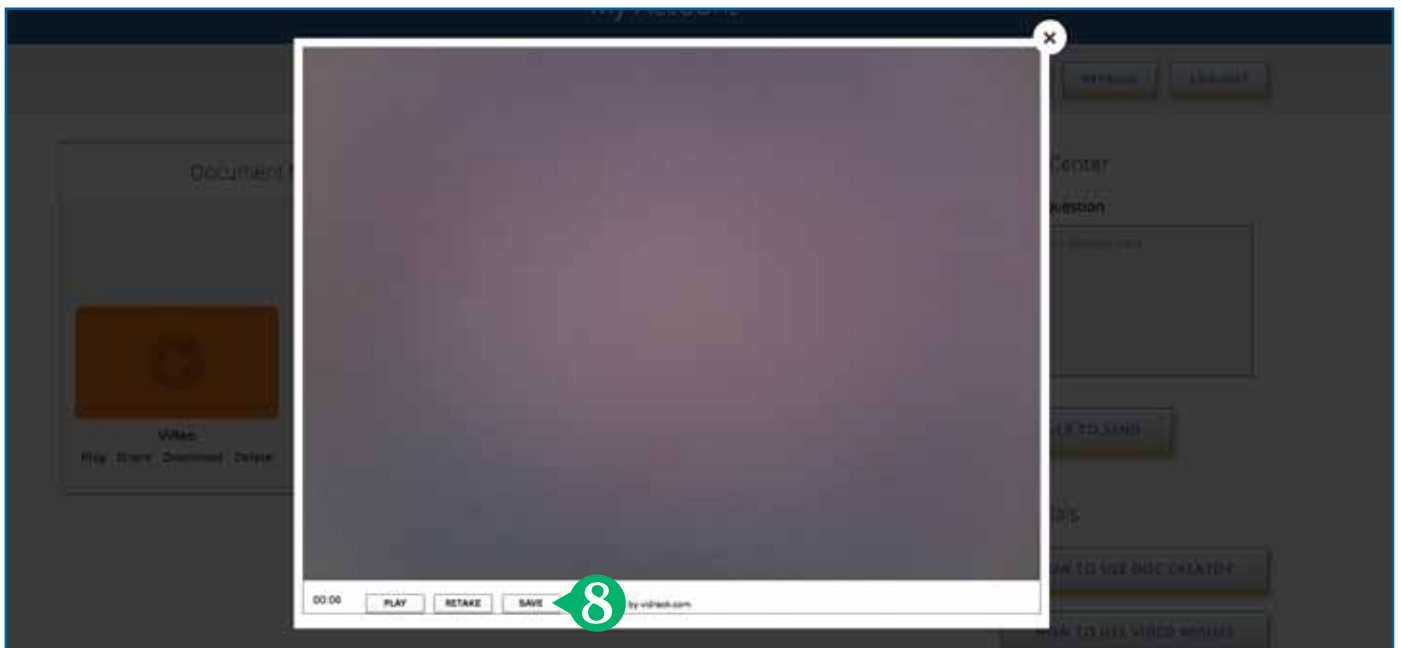


- ⑦ Once you are finished recording your video, click on the "Stop" button.

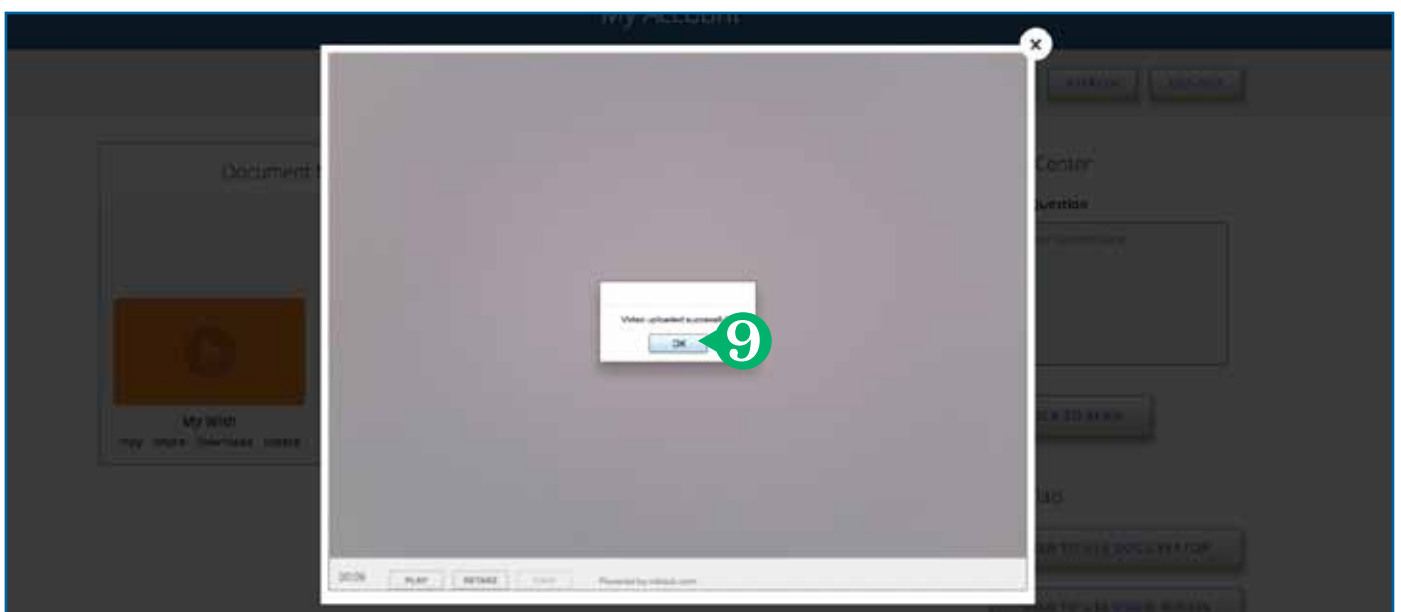


VideoWishes ...continued

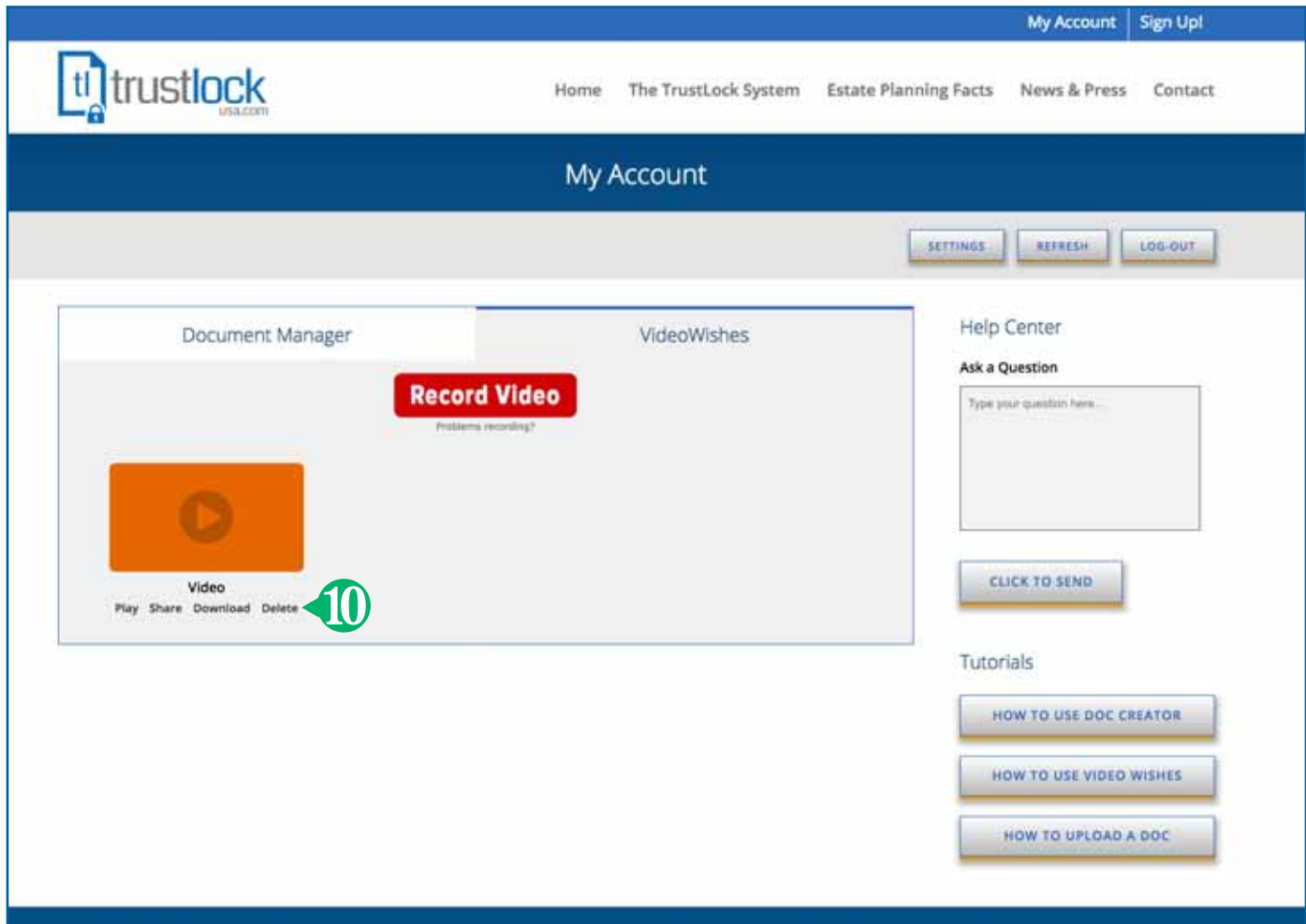
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- **Play:** plays that specific video right on your devices screen
 - **Share:** generates a private web address that you can email to anyone for viewing
 - **Download:** allows you to download any video directly to your device
 - **Delete:** allows you to delete a specific video



LawReview

The TrustLock membership gives you access to our legal team through our LawReview program. TrustLock's LawReview services will provide our members with on line access to our legal staff to answer questions relating to their TrustLock Estate Plan documents.

In addition, LawReview will provide TrustLock members with monthly communication newsletters and blog content concerning current issues as well as recent developments in the estate planning field. Our goal is to provide our Members with the most current information and educational tools to ensure that their estate planning goals are met.

Finally, Law Review will provide each Member with annual Trust Review and Certification Services which will ensure that you have reviewed your TrustLock Estate Planing documents and updated them as required.

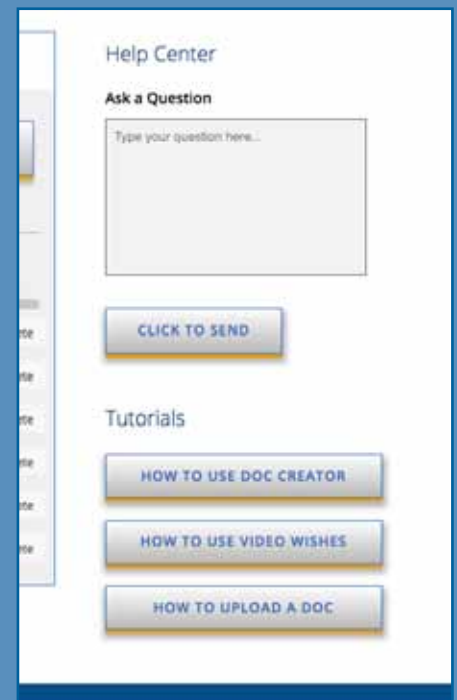
Includes:

- **Annual Review of your TrustLock Estate Plan**
- **Annual Trust Certification Service**
- **Monthly Estate Planning news and education**
- **On-line Access to the TrustLock Legal Staff to address estate planning questions.**



Help

In your TrustLock dashboard there is a help section on the right that allows you to quickly send questions by email directly to the TrustLock team. The "help" section also provides step by step instructions on using the features of your TrustLock account.



The Future of Estate Planning



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Create your Estate Plan in Minutes for Only \$99

- Living Trust
- Living Will / Healthcare Directive
- Pet Guardian
- Power of Attorney for Assets
- Real Property Deeds

[GET STARTED!](#)

Simply the most unique estate planning solution in the world!

 <p>DocCreator <i>Documents in Minutes</i></p> <p>DocCreator is accessible directly from your TrustLock account dashboard, allowing you to create all your essential estate planning documents by filling out a single form. Once your documents are completed they are stored and locked in your account accessible only by you.</p> <p>LEARN MORE!</p>	 <p>VideoWishes <i>A Video Legacy</i></p> <p>Your TrustLock account also comes standard with VideoWishes. VideoWishes gives you the opportunity to leave personal video messages to the ones you love after you are gone. This clarifies your intentions and reinforces the estate decisions you have made.</p> <p>LEARN MORE!</p>	 <p>DocLock <i>Secure Storage</i></p> <p>Upload and store any important documents you may have to your TrustLock account, along side any documents you create with TrustLock's DocCreator. TrustLock uses bank-level AES-256 encryption, SSL using 2048-bit certificates to guard your data.</p> <p>LEARN MORE!</p>	 <p>CloudDoc <i>Access Anywhere</i></p> <p>TrustLock's Cloud-based system securely gives you and the loved ones you assign access to all your important legal documents anytime, anywhere in the world using your computer or smart phone. CloudDoc also ensures that your information is backed up.</p> <p>LEARN MORE!</p>	 <p>LawReview <i>Legal Resource Team</i></p> <p>The TrustLock membership gives you access to our legal team through our LawReview program. You can get answers from us about all aspects of your estate planning strategy and your TrustLock membership tools. Monthly news and education articles are also included.</p> <p>LEARN MORE!</p>
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