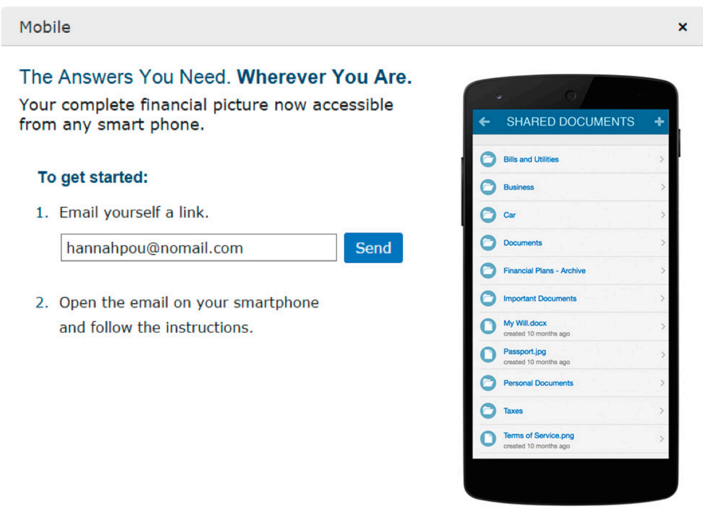
My Money Life Center - The Vault

THE LUBITZ FINANCIAL GROUP
Personal Financial Planning & Investment Management

My Money Life Vault

The Vault is a searchable repository in which files are stored for your review, and where you can also store files. Files may include your financial plan, prospectuses, reports, and spreadsheets. Vault files are separated into several different folders by content.

You save files and create sub-folders in two folders: My Documents and Shared Documents. The My Documents folder is for storing private files that you only can see. The Shared Documents folder is for saving files that you want to securely share with your advisor.



Accessible from Mobile

Since My Money Life Center is mobile, you can access the vault from wherever you are! Going digital with important documents helps ease the mind. If there's an emergency, documents like wills, deeds, and proof of identification can be accessed digitally at your fingertips.

Secure

- Our system uses a 256-bit Secure Socket Layer to scramble data
- Routine Security Testing by third party security auditors
- Data secured at geographically separated data centers

Storage Checklist

- Personal Documents: Driver's License, Passports, Birth Certificate, Social Security Info
- Accounts: Statements, Quarterly Reports, Portfolio Analysis
- Legal Documents: Wills, Deeds, Trusts, Buy/Sell agreements, Marriage License, Title to Home/Auto/Boat
- Other: Tax Returns & W-2 Forms, Pay Stubs, Employment Benefits, Insurance Policies