



QuickStart Guide

How to use: Legal

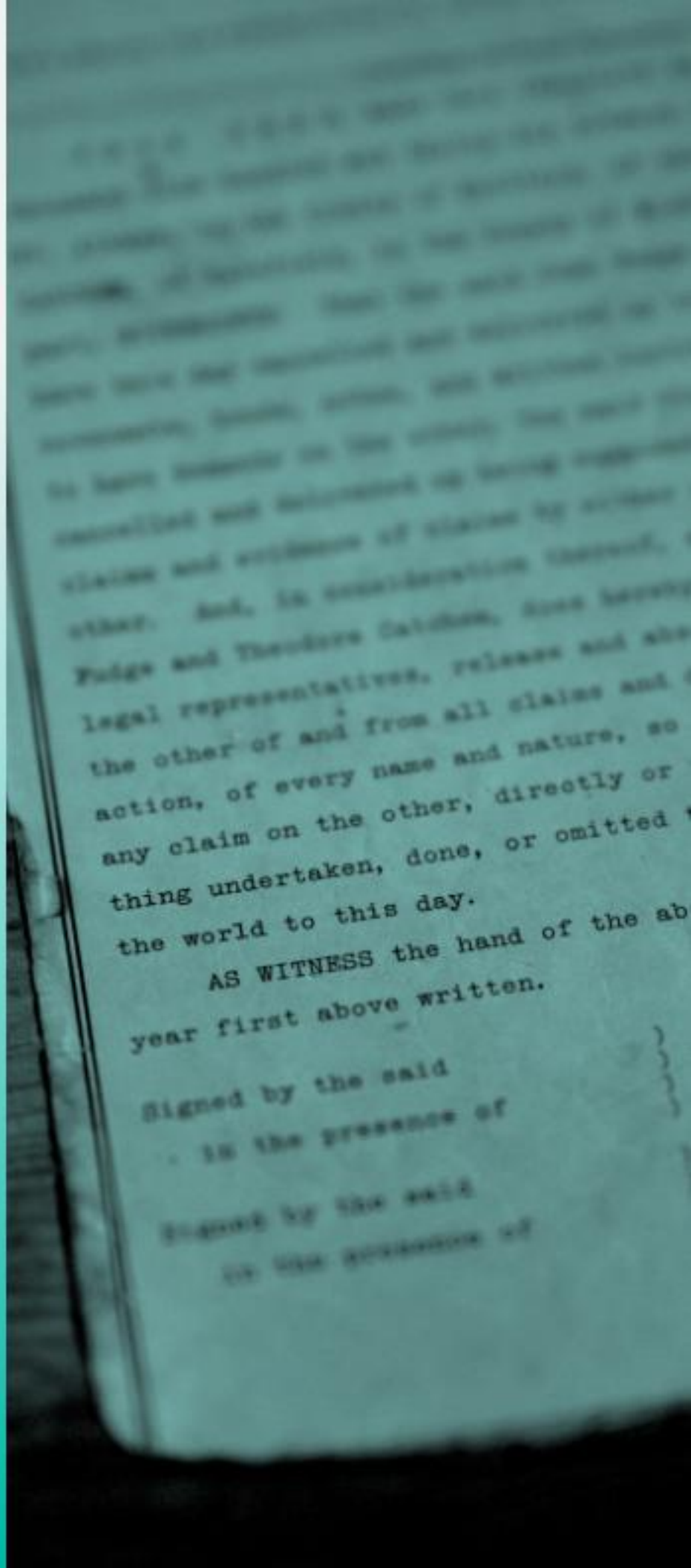


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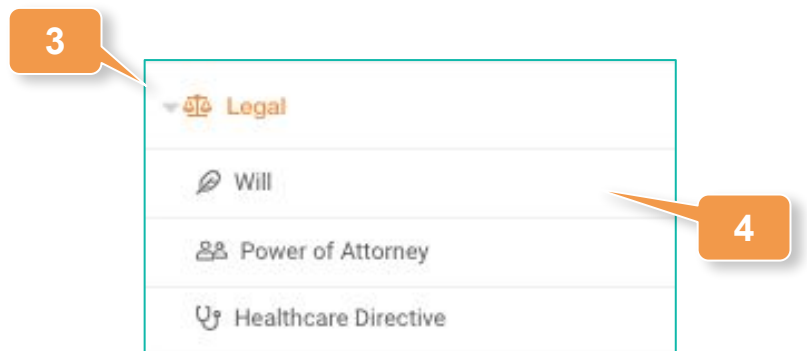
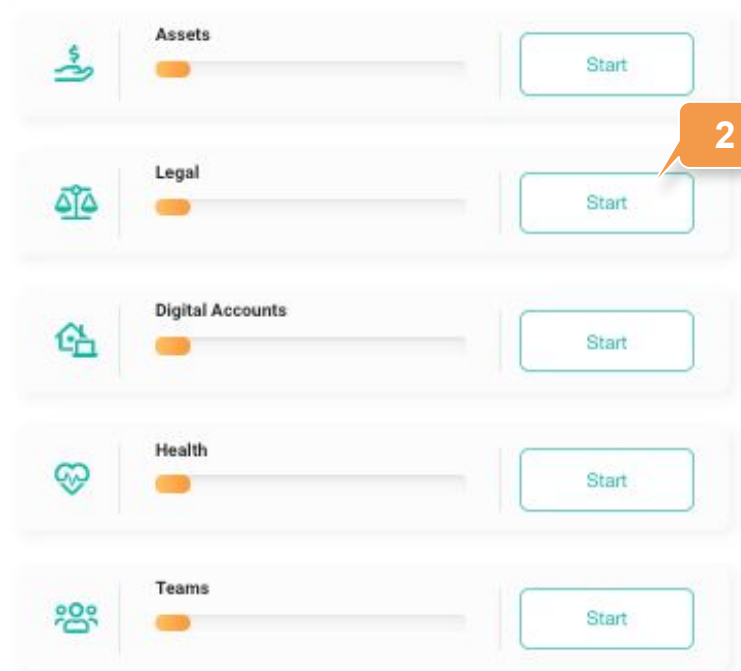
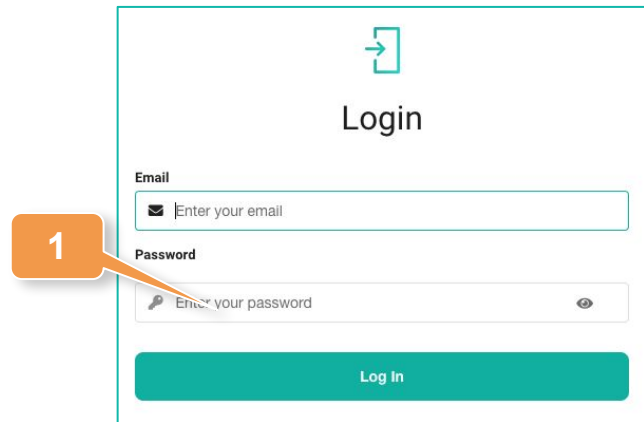
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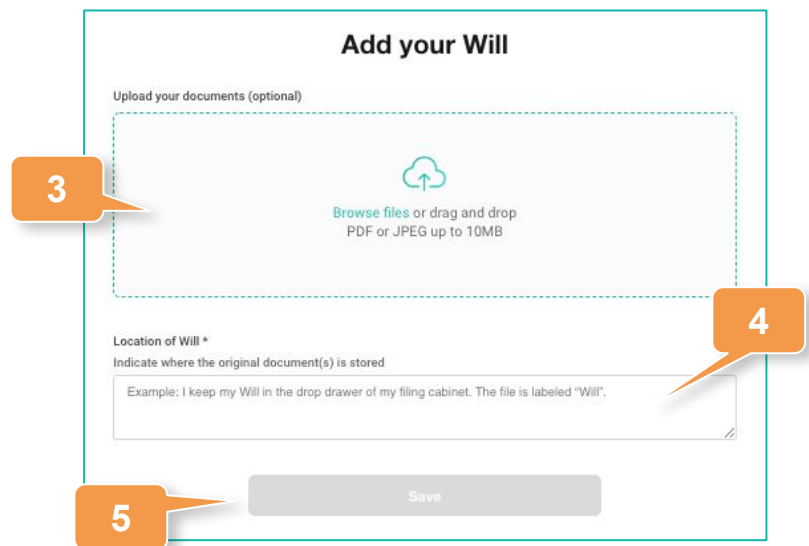
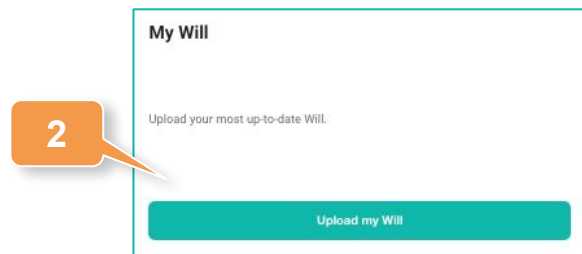
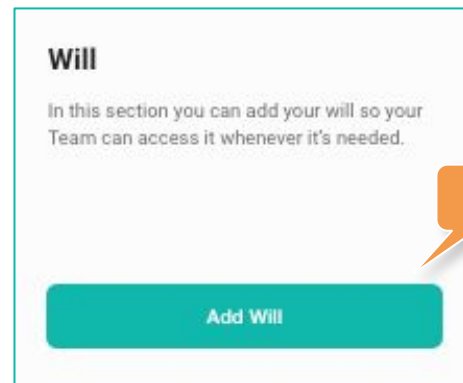
Logging in and Navigation

1. Login to the ReadyWhen application at: <http://app.readywhen.ca>
2. Click the **Start** button for the relevant area of your dashboard to open it.
3. Alternatively, expand the relevant area in the left side navigation by clicking the right pointing triangle.
4. From the expanded list, click on the area you would like to open.



Adding a Will

1. Click on **Will** in the left hand navigation or **Add Will** from the Legal Overview page.
2. Choose if you would like to add your own will or one for your partner/spouse and click **Upload Will**.
3. Upload a digital version of this document.
4. Identify where the original document is stored.
5. Click **Save** to complete the record.



Adding a Power of Attorney

1. Click on **Power of Attorney** in the left hand navigation or **Add Power of Attorney** from the Legal Overview page.
2. Choose if you would like to add a Power of Attorney for yourself or for your partner/spouse and click **Upload Power of Attorney**.
3. Upload a digital version of this document.
4. Identify where the original document is stored.
5. Click **Save** to complete the record.

Power of Attorney

In this section you can add a power of attorney: this will authorize an individual to act on your legal and financial behalf.

Add Power of Attorney

Power of Attorney

Upload your Power of Attorney to authorize an individual to act on your legal and financial behalf.

Upload my Power of Attorney

Add your Power of Attorney

Upload your documents (optional)

Browse files or drag and drop
PDF or JPEG up to 10MB

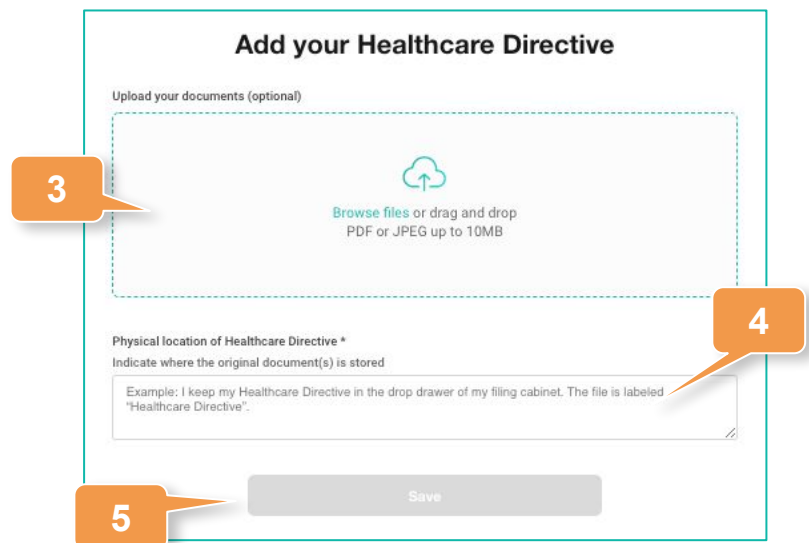
Physical location of Power of Attorney *
Indicate where the original document(s) is stored

Example: I keep my Power of Attorney in the drop drawer of my filing cabinet. The file is labeled "Power of Attorney"

Save

Adding a Healthcare Directive

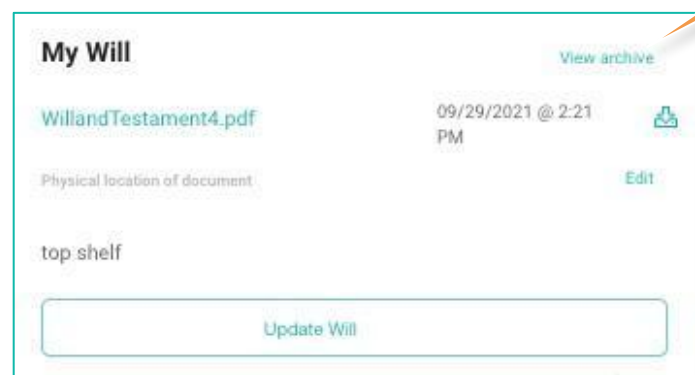
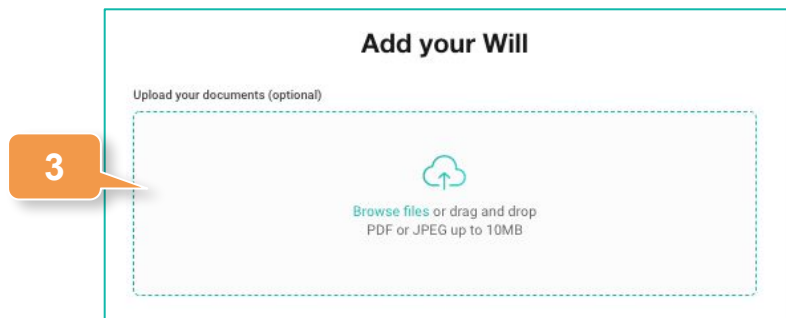
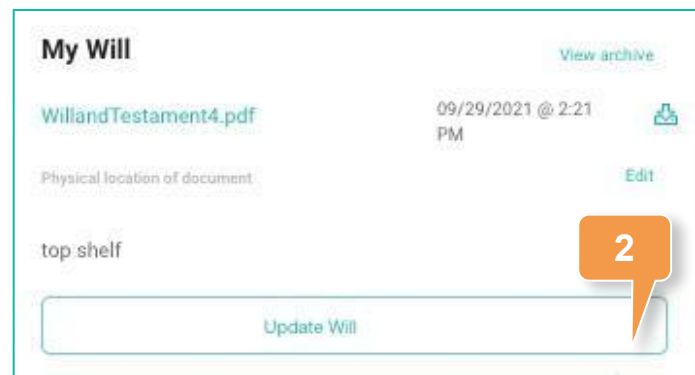
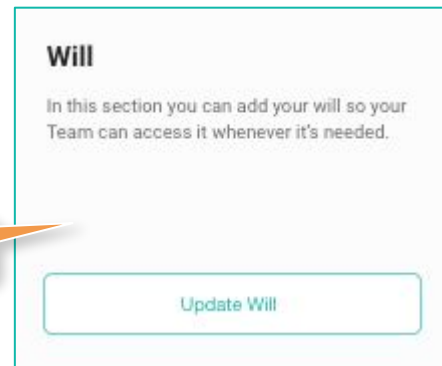
1. Click on **Healthcare Directive** in the left hand navigation or **Add Power of Attorney** from the Legal Overview page.
2. Choose if you would like to add a directive or yourself or for your partner/spouse and click **Upload Healthcare Directive**.
3. Upload a digital version of this document.
4. Identify where the original document is stored.
5. Click **Save** to complete the record.



Updating a Legal Document

Legal documents can be updated, but not deleted. Once a document has been revised, previous versions are available under an archive section.

1. Expand **Legal** in the left hand navigation and click on the relevant document section or click **Update** within the Legal Overview page.
2. Choose if you are updating your own document, or that of your spouse/partner. Click the **Update** button.
3. Upload your document and click the **Save** button.
4. Previously uploaded versions can be accessed by clicking the **View Archive** button.



Contact Support

The ReadyWhen Support Team is available to assist if needed. Contact us at:

T: +1.855.908.5292

E: support@readywhen.ca

W: <https://readywhen.com/support>