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# Welcome to the Client Care Program Document Portal!

We have created this secure document portal to provide you with 24/7 access to all your estate planning documents. Below is a tour of the highlights of the portal.

#### Welcome

Under the "Welcome" tab you will find an overview of the benefits of the Client Care Program, instruction to help you complete your homework, and a resource to reference when a loved one dies.

## My Estate Plan

Under the "My Estate Plan" tab you will find the overviews of your estate plan and assets, estate planning documents, asset related documents, and your personal property memorandum.

#### **My Personal Files**

The "My Personal Files" tab is a space for you to upload photos, letters, or additional instructions. You may also upload your completed personal property memorandum to share with our team.

## Contact Us

Have a question? You will find our contact information here.

Thank you for trusting us with the creation of your estate plan. We look forward to continuing our relationship with you through the benefits of our Client Care Program. As always, please do not hesitate to call if you have any questions or concerns.

With gratitude,



The Team at NW Legacy Law