

You **Sign.**

We **Seal** and **Deliver.**



**Discover the Online Document Access Solution
More Attorneys and Wealth Managers Prefer**





What happens to your clients' vital documents after they're drafted and signed?

In theory, they're stored someplace safe. **In practice, it's a different story.**

So often, medical directives are unavailable at crucial decision points. Wills and trust documents can't be located. Beneficiaries lose death benefits because they didn't know a policy existed.

You're not the one who creates these problems. But you can be the one who solves them. With DocuBank, you've got a turnkey solution that offers significant benefits for your clients while delivering equally significant benefits for your firm.

What is DocuBank®?

DocuBank provides the ideal solution for all of your clients' vital documents.



Advance directives and key emergency information are easily accessible to emergency personnel and loved ones through a personalized wallet card.

Estate plans and other key documents are also stored securely, with custom controlled access.

All members have emergency access to a DocuBank representative 24/7/365.



"I can't count how many times our office gets calls from our clients reporting the ease of use and the convenience DocuBank provides in the midst of stressful medical emergencies. Accordingly, DocuBank has contributed to the good reputation of our law firm."

— Louis Pavone, estate planning attorney, Lombard, IL

Who chooses DocuBank — and why.

Your clients trust you to handle their affairs with skill and integrity. They also look to you for peace of mind — not just today, but tomorrow. **That's where we come in.**

With DocuBank, your clients' vital records are stored securely, yet are **immediately accessible when needed.** And for medical directives, each member gets a detailed personal wallet card for immediate emergency access. So the good work you do will be sure to translate into the results your clients count on.

How well do we actually deliver? We asked clients who have actually experienced a medical emergency or hospitalization. Their answer: **99% said DocuBank was better than any other method of retrieving their directives.**

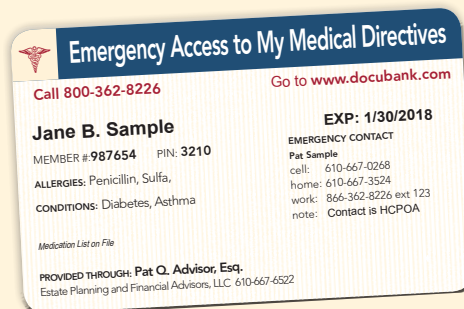


"We would have chosen DocuBank for the convenience factor and the client benefits alone. The fact that it is also a natural sales tool, as well as a competitive point of difference, makes it a truly valuable asset to our business."

— Michael Smith, estate planning attorney, Savannah, GA

Benefits that really matter to your clients. Your firm does well by doing good.

- **A highly secure online repository for all documents,** including estate plans, financial and insurance documents, digital asset list, etc.
- **Controlled access to all documents,** with strong protection against unauthorized access while providing easy access to authorized users.
- **A wallet card for instant access to medical directives.** Also lists medical conditions and allergies.
- **24/7/365 emergency support** to ensure that difficult medical situations get immediate attention.
- **Additional specialized services** for several key populations, including:
 - families with minor children
 - college students
 - special-needs adults
 - LGBT families and individuals
- **Greater client confidence.** Clients overwhelmingly see DocuBank as enhancing confidence in their attorney or advisor.
- **Your brand on all materials,** including online, print, and the wallet card. These are seen by clients, their family and friends as well as banks and hospitals.
- **The ability to broaden your client base** by offering services that extend your reach into clients' families, including the next generation.
- **Personalized client update materials** that drive clients back to you for possible updates or new business.
- **Add value to your annual client program** with DocuBank renewals.
- **Handle enrollment from your current software** — most major estate planning software already has DocuBank enrollment capability built right in.



74%

How often medical directives are unavailable when caregivers must make crucial care decisions.

93%

The percentage of DocuBank members who say they are satisfied with the service.

100%

The percentage of new attorneys who think getting started with DocuBank is "easy."



Benefits for your clients

- **Peace of mind** that vital documents are secure yet easily accessible.
- Confidence that **decisions will be known and honored**, even in emergencies.
- Help in preserving loved ones' **access to digital assets** (both valuable and sentimental) in case of a disability or death.
- Confidence that caregivers will be **alerted to important allergies and medical conditions**.
- Confidence that a **DocuBank representative will be available in a medical emergency** — even nights, weekends and holidays.
- Option of **adding services for children** and for adults with special needs.
- **Reassurance** that you are truly looking out for their interests.



Benefits for your business

- High-value benefit that **sends a strong “extra mile” message** about you.
- Creates **referral opportunities** to next-generation family members, medical providers and wealth managers.
- **Automatic branded client-service messages** provide continued follow-up contact with clients.
- Compelling **point of difference** with competitors.
- **Your firm name printed on wallet card** along with business contact information.
- **Turnkey operation** with easy start-up and highly convenient usage features.
- **Range of optional features** to suit your firm.
- **Relief from client expectations** of being the “point person” for document storage and access.

Also Services for:



Young Families



Special Needs Adults



College Students

Founded in 1993, DocuBank is the first and largest national advance directives registry. The firm currently maintains health care proxies and other vital documents for more than 200,000 individuals, and provides services for clients of thousands of attorneys, estate planning/wealth advisors, seniors'

consultants, associations and others. DocuBank is a highly customer-focused business with a strong belief in good corporate citizenship. We work by building relationships with professionals and organizations and by combining new technologies and ideas with quality and reliability. We welcome your feedback.

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