ECKERT BYRNE LLC
A LIFE AND LEGACY PLANNING LAW FIRM

Secure File Sharing User Guide

In today's digital age, keeping sensitive information secure from theft and vulnerability is becoming increasingly important as well as difficult. At Eckert Byrne, we have made a concerted effort to provide peace of mind to our clients when it comes to sharing sensitive or confidential information and documents with us. To do this, we ask that prospective and active clients who would like to electronically share information with us do so using **Eckertbyrne.ShareFile.com (Citrix's ShareFile)**. Similar to Dropbox, this secure folder service allows you to safely share your personal information with our team by easily uploading your documents using any mobile/tablet or computer (either at home or at work).

Prospective Clients:
To provide a complete and accurate recommendation for an estate plan, we ask that you provide some information prior to our initial consultation. This information is personal in nature, and concerns both your family and financial structure. Some of these documents include copies of bank account and retirement account statements, life insurance policies and our personal information form (which includes account numbers and SSNs). We ask that you please *NEVER* send any of this information to us via email, and instead either bring hard copies to your meeting or share securely via ShareFile.

Active Clients:
After the design meeting, and once you have provided completed personal and asset information to us, our team will securely provide you with your flowchart and asset table via our protected file-sharing service. After your delivery meeting, our team will securely provide you with an electronic copy of your executed estate plan binder containing all your estate planning documents.

Benefits of Private File-Sharing Services:

- Beyond Office Hours – 24 Hour Access to securely deliver requested personal information, asset statements, and/or documents relevant to your estate planning to keep the process moving smoothly.
- A more reliable, secure, and faster transmittal of documents which means less risk of cyber hacking and access of your personal information.
- A unique shielded safeguard exchange method where both clients and the Eckert Byrne team can track and manage any updates or changes that have been made throughout the planning process.
- Email confirmation from an Eckert Byrne team member that your documents are received and in good hands!

NOTE: The file-sharing folder created during planning is not intended as a long-term electronic storage facility for your estate planning documents. Your ShareFile folder will be available 60 days from receipt of your physical estate plan binder. An electronic copy of your estate plan documents will be uploaded to your folder and you'll be able to download the document and save it to your personal files.