



Next Steps Instructions

EP Navigator will print and ship your estate plan binder in 7 -10 days via USPS Priority Mail.

Once You Receive the Documents, follow these steps...

STEP 1: Set up your account.

- You should have an invitation to set up your user account in your email. Please check spam if you don't immediately see it.
- Use the Document Options icon to view or download your documents. PLEASE DO NOT CLICK THE DOCUMENT OPTIONS ICON TO CHANGE YOUR DOCUMENTS unless that is your intention.
- You can send invitations to other people mentioned in the documents from the People Tab

STEP 2: Read this article on Executing the Estate Plan

- Sign and notarize the signature pages (Instructions are included in your documents)
- Scan the original signature pages and upload them into your client dashboard.
- Complete the portal prompt to enter the dated signed

STEP 3: Read this article on Funding the Living Trust. If you did not already order the new deed, you can log into your client dashboard, click on the Deed tile and order deed(s). The cost is \$150 and typically takes 2-4 days for the deed to be delivered via email. (Not available in NY, MD, LA, OH, AL, NJ, & VA). **Note:** Once the new deed is emailed to you, you will need to sign it and file at the county recorder's office.