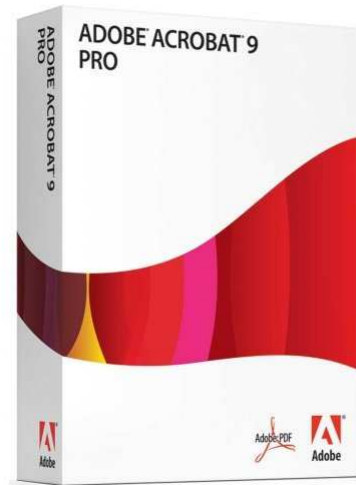


Software for Using PDF Forms in the Estate Digital Lockbox

You can fill in and save forms in the Estate Digital Lockbox with the following software:

1. ***Adobe Acrobat Professional*** on Microsoft Windows or an Apple Macintosh. If you have already purchased and installed this software, **go to page 2 and follow the instructions.**



OR

2. The ***Free Foxit Reader*** on Microsoft Windows. To install this software, **go to page 4 and follow the instructions.**



Note that the Free Adobe Reader will not work.



Instructions for using the Digital Lockbox with Adobe Acrobat Professional.

- A. Read **Step 2** of your lockbox folder.
Click a “**blank PDF form**” to open it.

The screenshot shows the 'personaldata drawer' interface. On the left is a navigation menu with categories like 'personal data drawer', 'financial & legal drawer', 'my legacy drawer', and 'miscellaneous drawer'. The main area is titled 'PERSONAL INFO' and contains three sections: 'FOLDER CONTENTS' with a table of files, 'BLANK PDF FORMS (Follow steps 1-5 on right)', and 'STORE IN THIS FOLDER (Follow steps 4-5 on right)'. A 'need help?' icon is at the bottom left. On the right, an 'INSTRUCTIONS' panel lists five steps for using the lockbox. Red arrows point from the instructions to the 'BLANK PDF FORMS' section and from the 'need help?' icon to the 'step 2' instruction.

PERSONAL INFO

FOLDER CONTENTS

File Name	Size(bytes)	Uploaded
PersonalItems.pdf	75198	14 Feb 2010-20:08
Contacts-FinancialandLegal.pdf	56618	17 Feb 2010-22:30

BLANK PDF FORMS (Follow steps 1-5 on right)

- PersonalItems.pdf
- ImportantDocuments.pdf
- PersonalInformation.pdf
- Contacts-FinancialandLegal.pdf
- Contacts-MedicalandOther.pdf
- Contacts-Additional.pdf
- Contacts-Family.pdf

STORE IN THIS FOLDER (Follow steps 4-5 on right)

Document: Browse...

Notes:

upload to lockbox

INSTRUCTIONS:

step 1
first time users must install software to enter & save info on blank PDF forms. It takes 5 minutes. *Click for instructions.*

step 2
"click" a blank PDF form to open it.

step 3
complete the form and "save" to your computer (desktop, my documents, or other findable location).

step 4
"click" **Browse** and "select" the completed form or other document stored on your computer.

step 5
"click" **upload to lockbox** to store completed forms or other documents.

deleting a stored document from your lockbox is not recommended for security reasons. *Click here* to learn more.

- B. **Step 3** - read instructions on a form to complete, edit, and save information (**Sample below**).

The screenshot shows a PDF form titled 'Personal Items' open in Foxit Reader. A blue instruction box at the top provides steps for filling out the form. Below the instructions, the form title 'Personal Items' is displayed, followed by a description: 'Use this form to list items that you normally keep secret or hidden from easy access.' A table with three columns is shown: 'Category', 'Item', and 'Where Stored'. The 'Category' column has a value of 'SECRET HIDING PLACES', and the 'Item' column has two entries: 'Jewelry' and 'Valuables'. The 'Where Stored' column is empty. A red arrow points from the 'step 3' instruction in the previous screenshot to the blue instruction box.

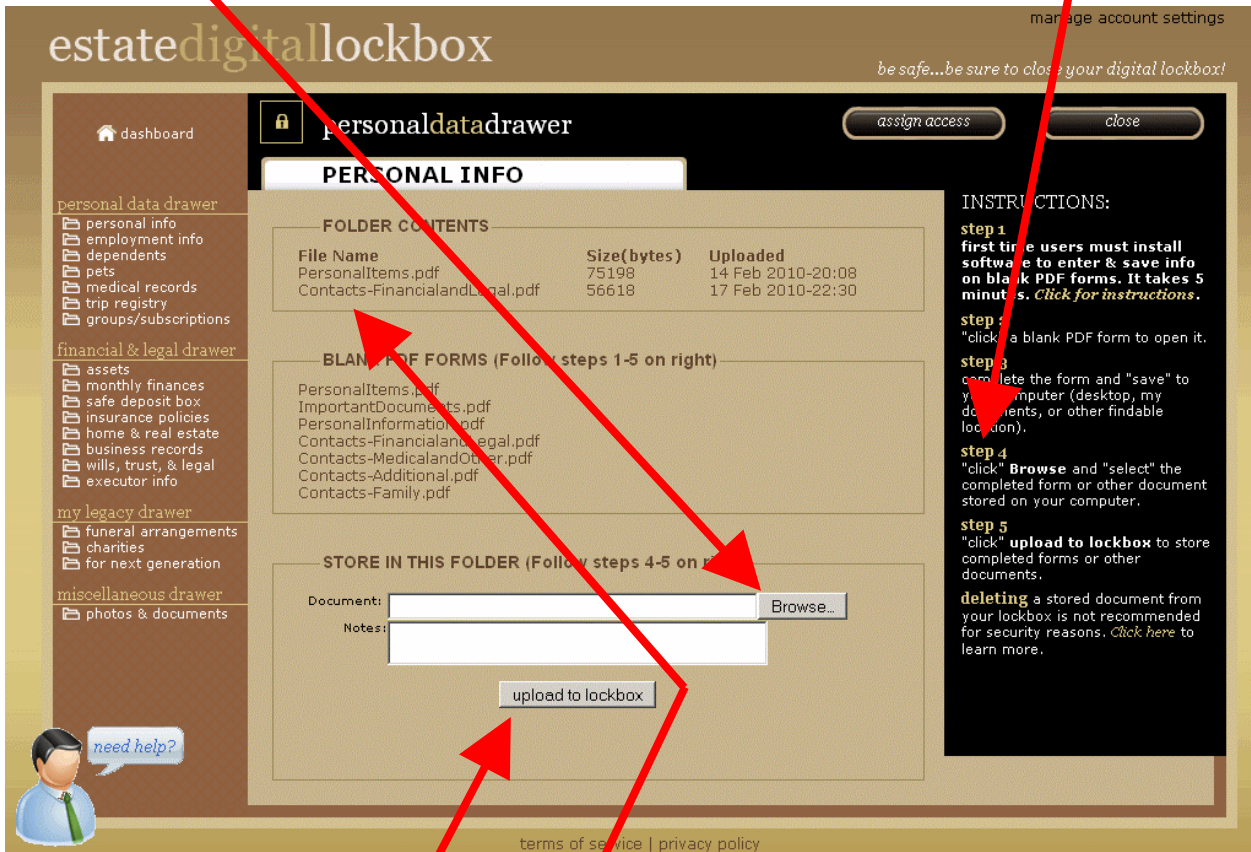
Personal Items

Use this form to list items that you normally keep secret or hidden from easy access.

Category	Item	Where Stored
SECRET HIDING PLACES	Jewelry	
	Valuables	

Moving a saved form into your Lockbox

- C. Read **Step 4**. Click **Browse** (“*Choose File*” if using Chrome or Safari) and find saved file.



- D. Step 5. Click **upload to lockbox**.
- E. Form will appear in **Folder Contents**.
- F. For security, you may want to **delete the uploaded form from your desktop**, electronically file it in a safe place on your computer, or print and save a paper copy in a safe location.
- G. You can **edit forms saved in your Folder Contents**. Simply click a file name to open it.

Congratulations!
You've mastered the Estate Digital Lockbox basics with Adobe Acrobat Professional.

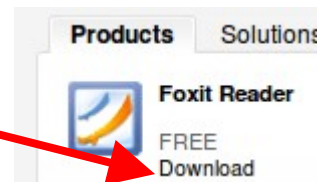
Instructions for installing the Free Foxit Reader for Microsoft Windows (XP, Vista, Windows 7)

The pictures below show Foxit being installed in Windows XP. The process is similar for Windows Vista, Windows 7, and Linux.

A. **Print** this checklist. Mark each item as you complete it.

B. Go to www.foxitsoftware.com

C. Click the Foxit Reader **“Download”** link



D. Click on **“Foxit Reader 4.1.1 (exe)”** to download.

Downloads - Latest Version

Note: You can download the language package you want

Foxit Reader

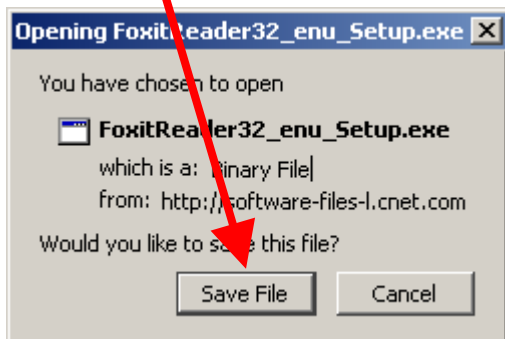
Product Name

Foxit Reader 4.1.1 (exe) **NEW**

Foxit Reader 4.0 (exe)

E. This bullet intentionally left blank

F. Click **“Save File”**:

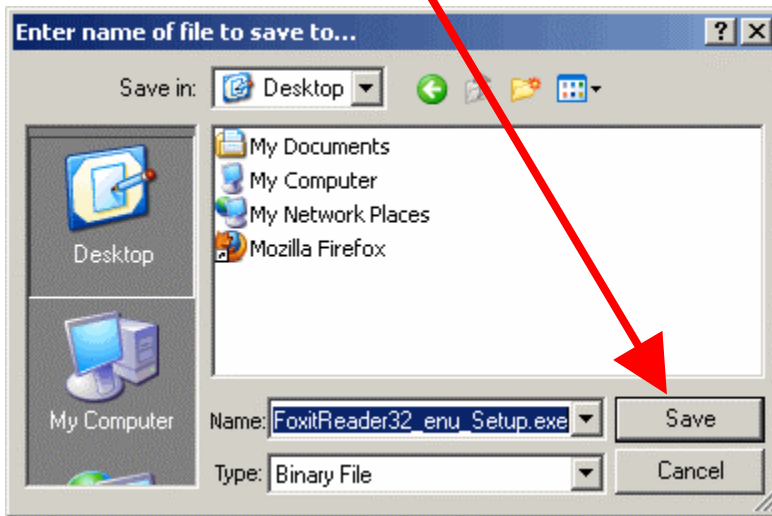


NOTE: If you do not see the box to the left:

- Check to see if your browser is blocking the download. If this occurs, enable the download.
- If you see something else, like “Open” or “Run” go ahead and click it. The process varies by browser or operating system.

The process may also jump to Step J below.

- G. Save this file on your **Desktop**:



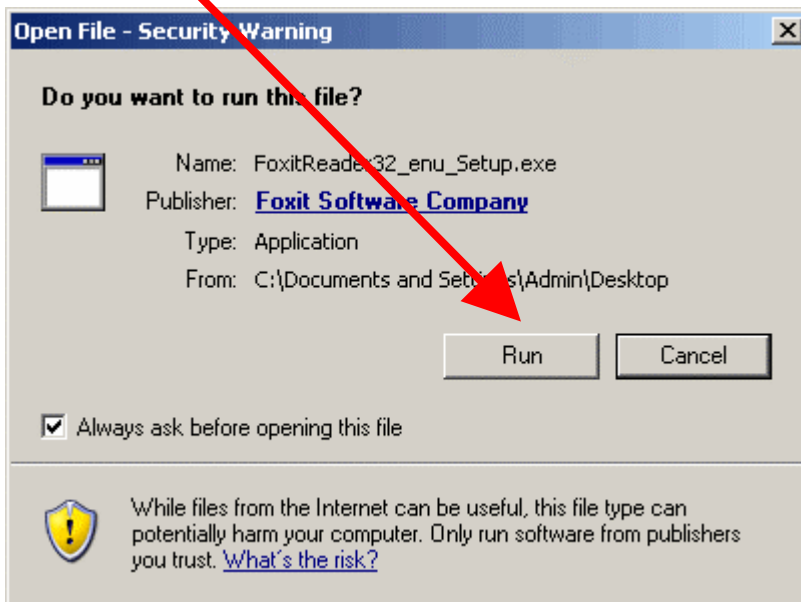
If you don't see this box, your system might have jumped to Step J below.

- H. **Double-click this icon** on desktop:



If this icon is not on your desktop and you're running Firefox, click "Tools", then "Downloads" to find FoxitReader32_enuSetup.exe and then click it.

- I. Click "**Run**":

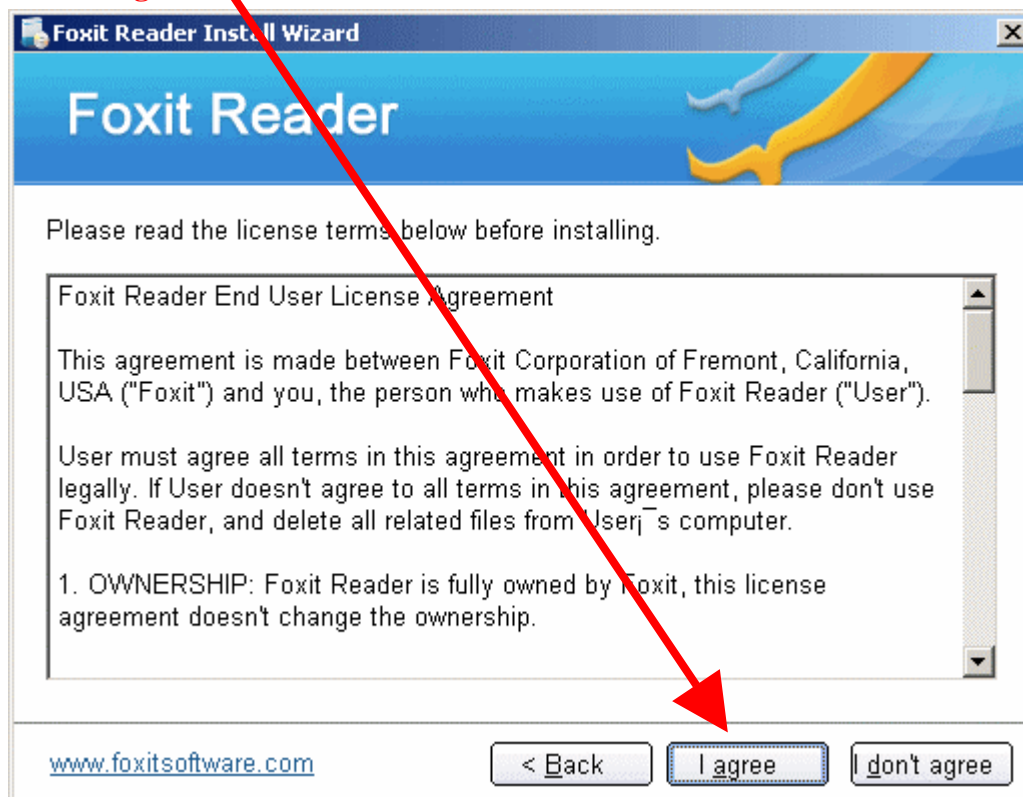


If you don't see this box, your system might have jumped to Step J below.

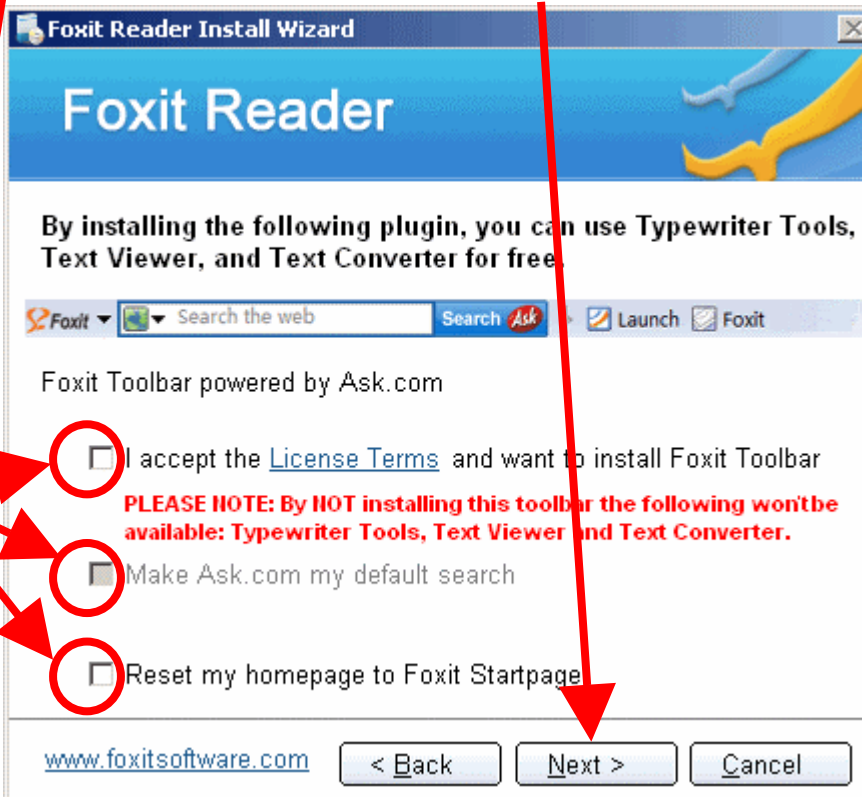
- J. Click **“Next”**:



- K. Click **“I agree”**:

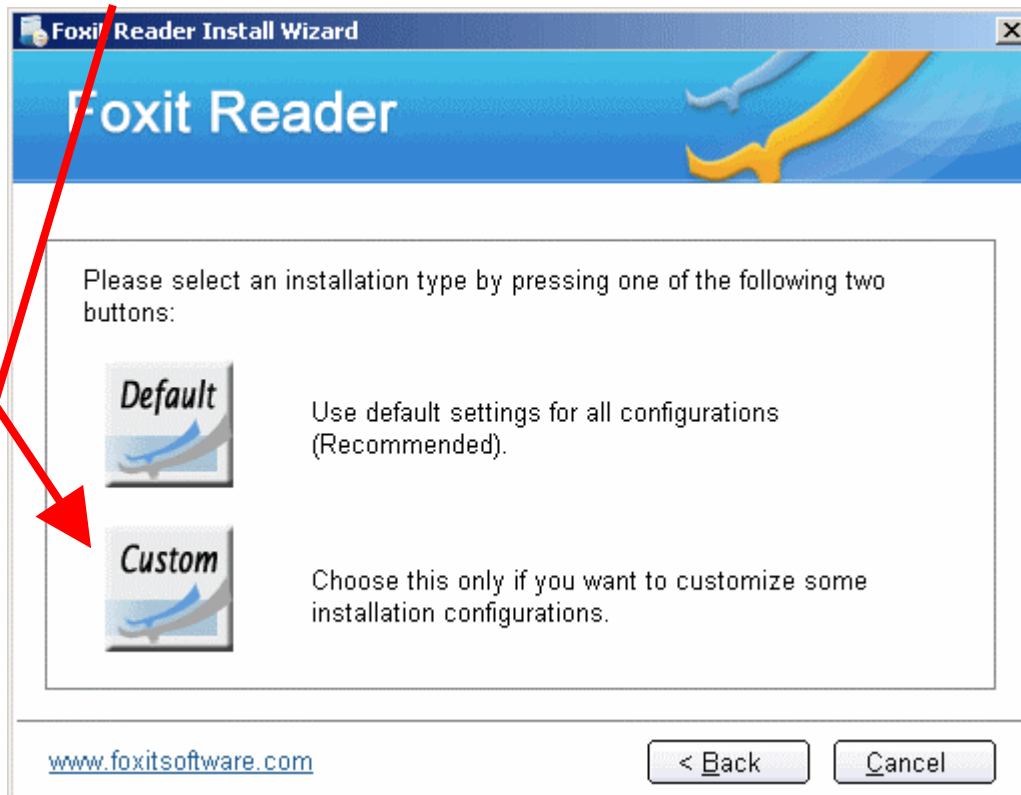


- L. **Unclick** the items circled. Then click **“Next”**:

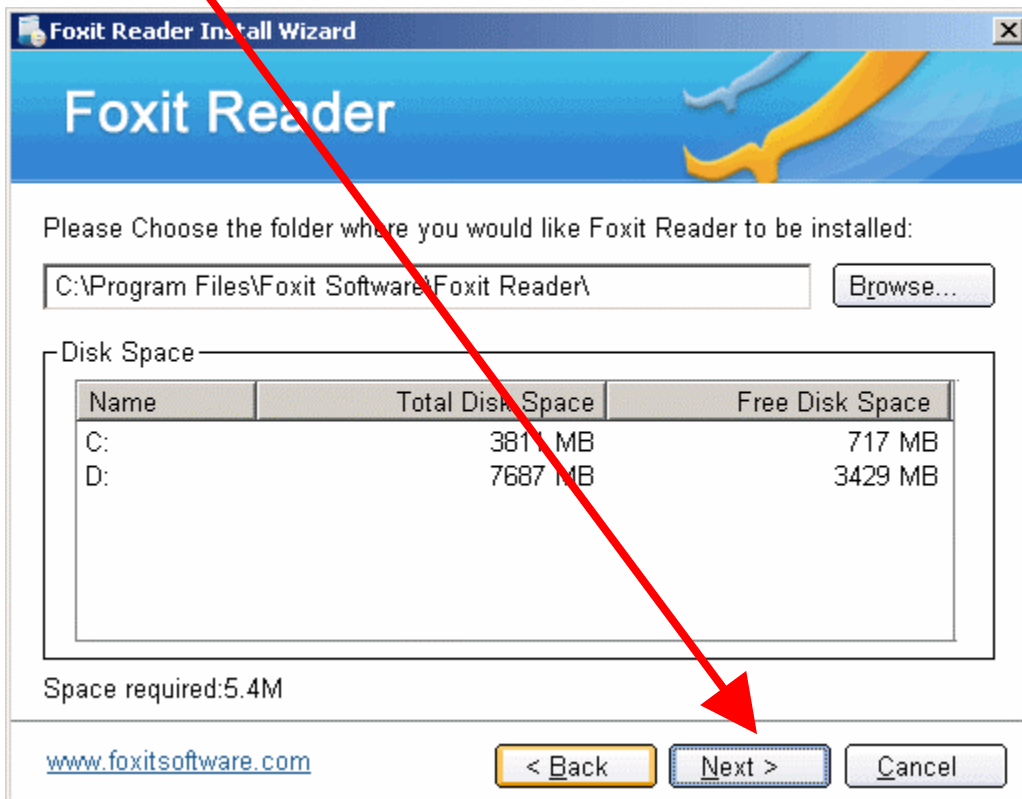


If you don't see this box, your system might have jumped to Step M below.

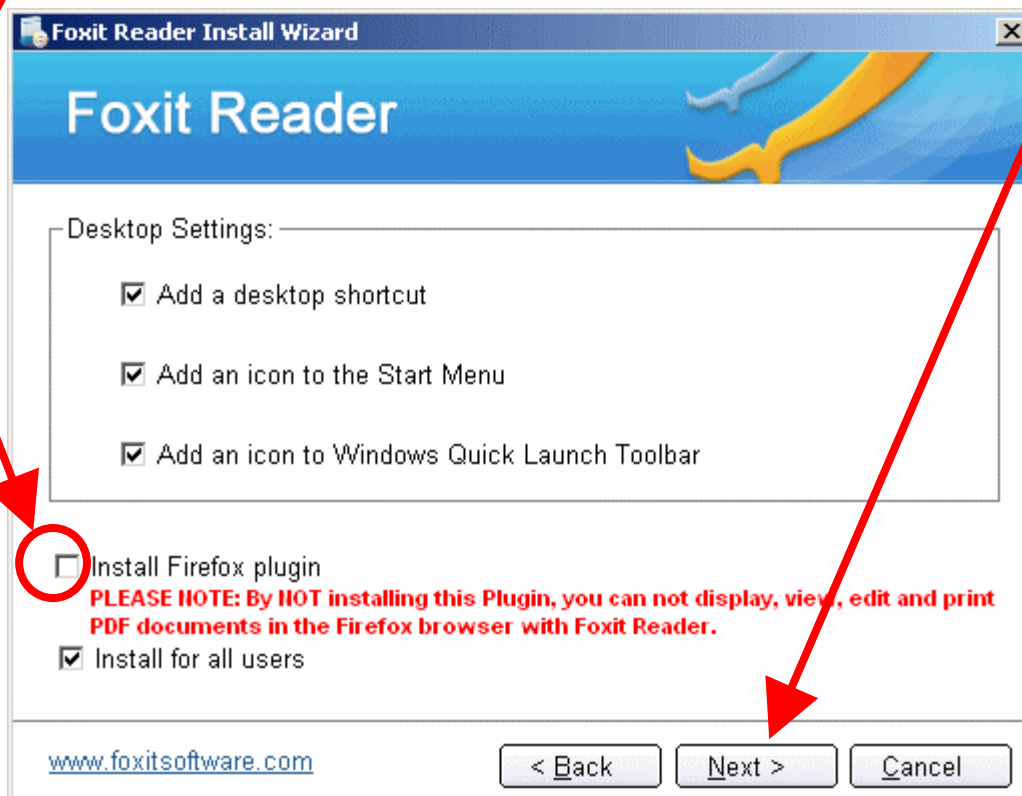
- M. Click **“Custom”**:



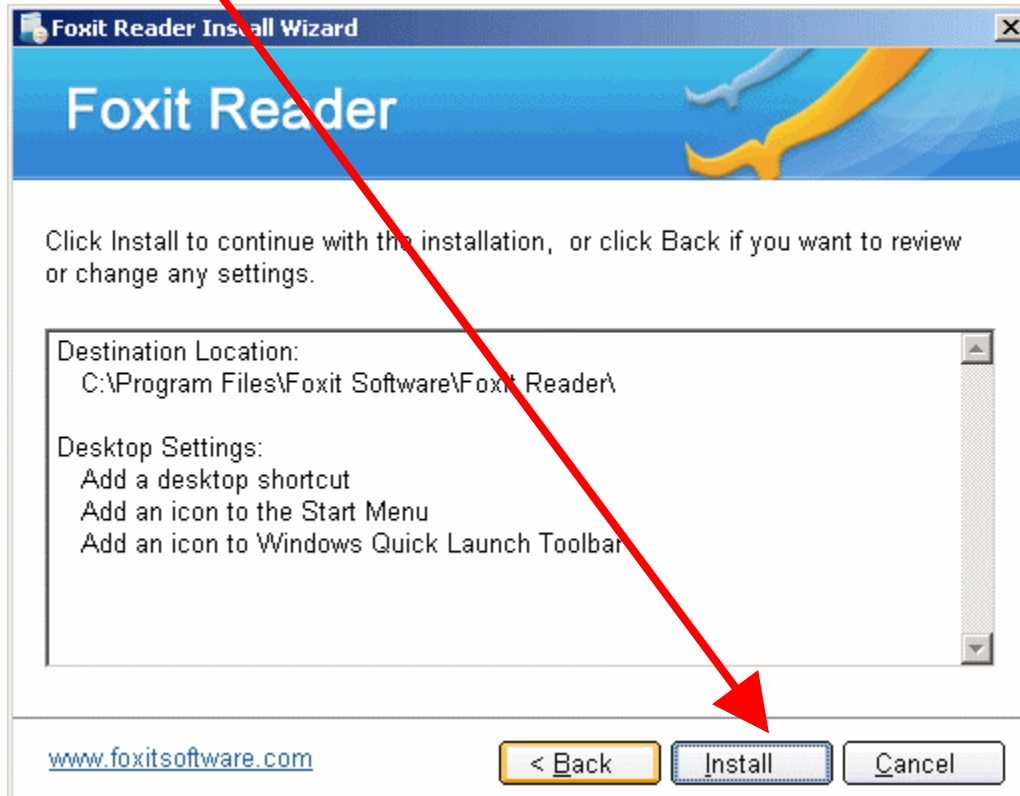
- N. Click “Next”:



- O. **Uncheck** “Install Firefox plugin” or “Install Internet Explorer plugin” box. Click “Next”:



- P. Click **“Install”**:

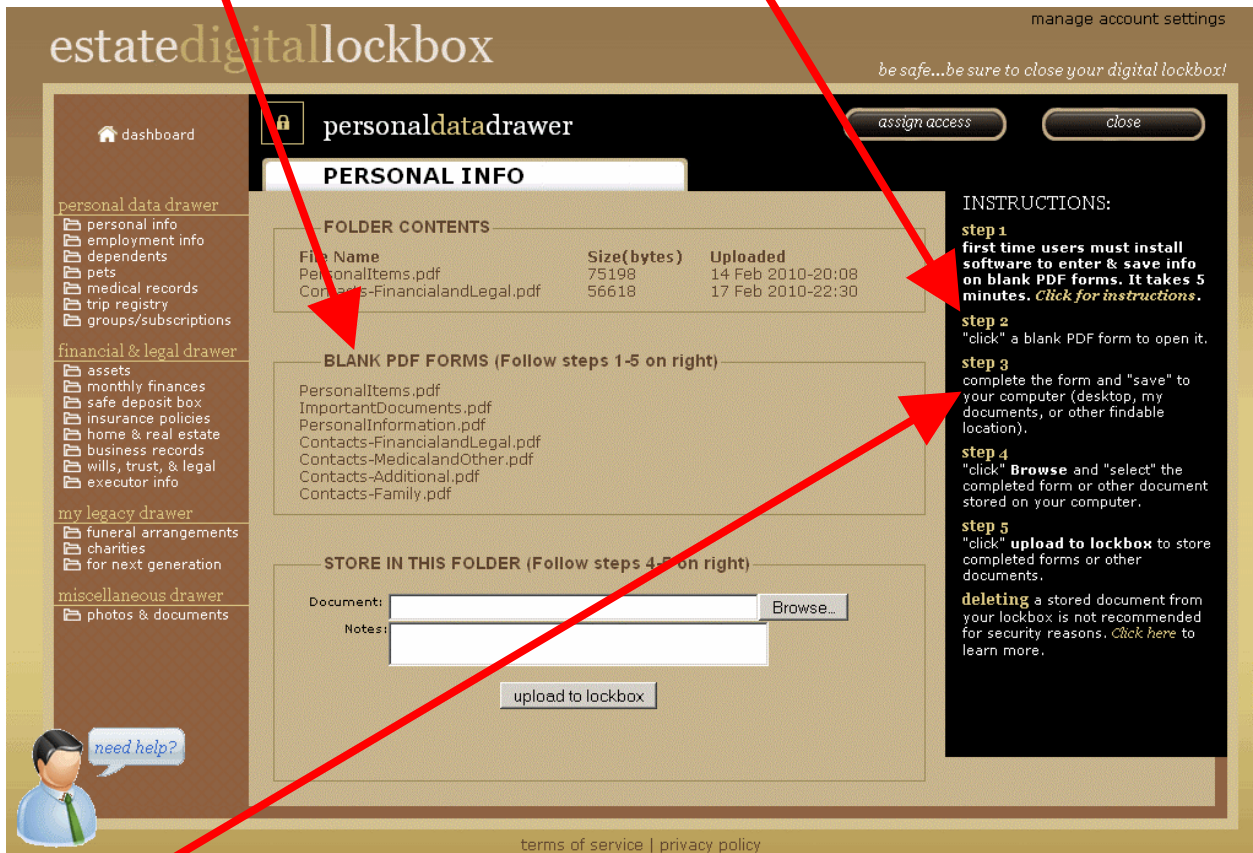


- Q. **Uncheck** “Run Foxit Reader” and “eBay” box. **Check** **“Make it your default PDF reader”**. Click **“Finish”**:



Your Lockbox is ready for use 

- R. Read **Step 2** of your lockbox folder. Click a “**blank PDF form**” to open it.

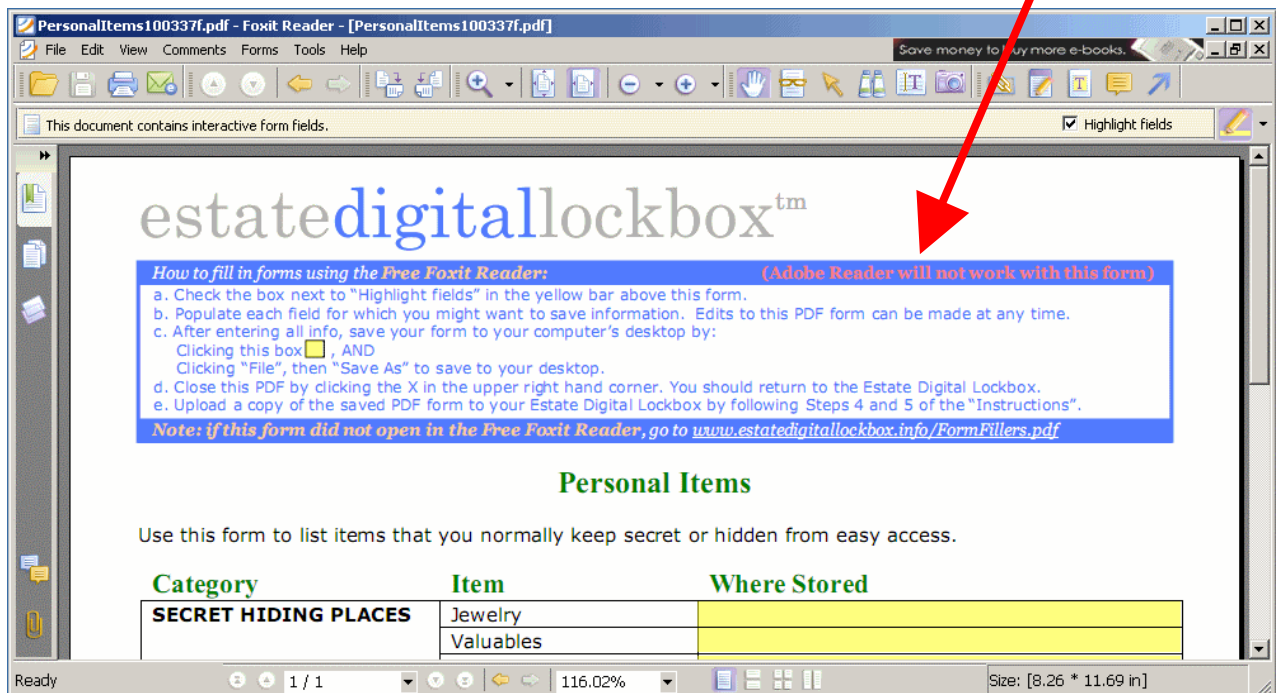


The screenshot shows the 'personaldata drawer' interface. On the left is a navigation menu with categories like 'personal data drawer', 'financial & legal drawer', 'my legacy drawer', and 'miscellaneous drawer'. The main area is titled 'PERSONAL INFO' and contains three sections: 'FOLDER CONTENTS' with a table of files, 'BLANK PDF FORMS (Follow steps 1-5 on right)', and 'STORE IN THIS FOLDER (Follow steps 4-5 on right)'. A table of files is shown below:

File Name	Size(bytes)	Uploaded
PersonalItems.pdf	75198	14 Feb 2010-20:08
Contacts-FinancialandLegal.pdf	56618	17 Feb 2010-22:30

Below this is a list of blank PDF forms: PersonalItems.pdf, ImportantDocuments.pdf, PersonalInformation.pdf, Contacts-FinancialandLegal.pdf, Contacts-MedicalandOther.pdf, Contacts-Additional.pdf, and Contacts-Family.pdf. At the bottom, there are input fields for 'Document:' and 'Notes:', a 'Browse...' button, and an 'upload to lockbox' button. On the right, an 'INSTRUCTIONS:' box provides a 5-step guide for using the forms. A red arrow points from the 'BLANK PDF FORMS' section to the instructions.

- S. **Step 3** - read instructions on a form to complete, edit, and save information (**Sample below**).



The screenshot shows a Foxit Reader window displaying a PDF form titled 'Personal Items'. A blue instruction box at the top reads: 'How to fill in forms using the Free Foxit Reader: (Adobe Reader will not work with this form)'. The instructions include: a. Check the box next to "Highlight fields" in the yellow bar above this form. b. Populate each field for which you might want to save information. Edits to this PDF form can be made at any time. c. After entering all info, save your form to your computer's desktop by: Clicking this box , AND Clicking "File", then "Save As" to save to your desktop. d. Close this PDF by clicking the X in the upper right hand corner. You should return to the Estate Digital Lockbox. e. Upload a copy of the saved PDF form to your Estate Digital Lockbox by following Steps 4 and 5 of the "Instructions". A note follows: 'Note: if this form did not open in the Free Foxit Reader, go to www.estatedigitallockbox.info/FormFillers.pdf'. Below the instructions, the form title 'Personal Items' is displayed, followed by the text: 'Use this form to list items that you normally keep secret or hidden from easy access.' A table with three columns is shown: 'Category', 'Item', and 'Where Stored'. The first row has 'SECRET HIDING PLACES' in the 'Category' column, 'Jewelry' in the 'Item' column, and a yellow highlighted cell in the 'Where Stored' column. The second row has 'Valuables' in the 'Item' column and another yellow highlighted cell in the 'Where Stored' column. A red arrow points from the instruction box to the 'Where Stored' column of the table.

Category	Item	Where Stored
SECRET HIDING PLACES	Jewelry	
	Valuables	

Moving a saved form into your Lockbox

- T. Read **Step 4**. Click **Browse** (“*Choose File*” if using Chrome or Safari) and find saved file.

The screenshot shows the 'personaldata drawer' interface. On the left is a navigation menu with categories like 'personal data drawer', 'financial & legal drawer', 'my legacy drawer', and 'miscellaneous drawer'. The main content area is titled 'PERSONAL INFO' and contains three sections: 'FOLDER CONTENTS' with a table of files, 'BLANK PDF FORMS (Follow steps 1-5 on right)', and 'STORE IN THIS FOLDER (Follow steps 4-5 on right)'. The 'STORE IN THIS FOLDER' section has input fields for 'Document:' and 'Notes:', a 'Browse...' button, and an 'upload to lockbox' button. On the right, an 'INSTRUCTIONS:' panel lists five steps. A red arrow points from the 'Browse...' button to the 'Folder Contents' table.

File Name	Size(bytes)	Uploaded
PersonalItems.pdf	75198	14 Feb 2010-20:08
Contacts-FinancialandLegal.pdf	56618	17 Feb 2010-22:30

- U. Step 5. Click **upload to lockbox**.
- V. Form will appear in **Folder Contents**.
- W. For security, you may want to **delete the uploaded form from your desktop**, electronically file it in a safe place on your computer, or print and save a paper copy in a safe location.
- X. You can **edit forms saved in your Folder Contents**. Simply click a file name to open it.

Congratulations!
You've mastered the Estate Digital Lockbox basics.