MyLegacy

Delivered when it matters most

Your words, when they matter most

How to Get the Most Out of MyLegacy

A practical guide to setting up your account, scheduling your first message, and building a habit that protects your family and the people who matter most.

For families · travelers · military members · first responders · business owners · digital nomads

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01 Set Up Your Account Correctly

A few minutes of setup make everything else run smoothly. Before creating your first message, go to **Account Settings** and take care of the basics:

- **Profile:** Add your email signature — it's automatically added to every message you send, so you only need to write it once.
- **Time zone:** Set it correctly so your scheduled deliveries go out exactly when you expect it.
- **Language:** MyLegacy works fully in English and Spanish — switch anytime from your profile.
- **Dark mode:** Switch the app's theme to dark mode with one click if you prefer.
- **Security:** Update your password periodically.
- **Membership:** Check this tab to see your plan and what it unlocks. For example, adding Cc recipients to a single delivery is available on the Legacy and Lifetime plans.

> **QUICK START:** Complete your profile before writing your first message. That way you won't have to stop and fill in details later.

02 Add Your Guardians First

Guardians are the trusted people who will receive your messages. Building this list before you start writing saves you from having to stop and look up an email address in the middle of your thoughts.

- Add each Guardia's name, email, and phone number in the **Guardian section**.
- Think beyond immediate family – a lawyer, accountant, or business partner may also need to be a Guardian if they should received instructions.
- Review the list periodically. Relationships and contact details change; your Guardian list should stay up to date.

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03 ✉Create Your First Message

Go to **New Delivery** to write your message.

- Fill the Subject, Recipient Name, Email, and, if you'd like to, Phone.
- Write your message in the **Email Content** or use **Record Voice Message** or **Record Video Message**. Hearing your voice, or seeing you, often means more than reading text.
- Attach files if the message needs supporting documents. Files up to 25 MB are supported.
- On the Legacy and Lifetime plans, you can add a Cc recipient so more than one person receives the same delivery.

> **PRO TIP:** Include one practical document (insurance policy, will, account list) plus a personal message in your first delivery. That combination is the most useful for whoever receives it. Not comfortable attaching important files? Just let your loved ones know where to find them.

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04 Save Time With Templates

If you find yourself writing similar messages for different people or moments — an annual update, financial instructions, a business handoff — create a Template once and reuse it.

- Go to **Templates**, name the template, write the subject and content, then save it.
- When you need it, open the template and select **"Use template"**to start a new delivery with that content already loaded.

> **IDEAS:** Great templates to create right away: Emergency contact instructions, Financial summary, Business handoff, and a Personal note for a loved one.

05 Schedule With Intention

Every delivery needs a date and time, so you'll want to set them deliberately.

- Use specific future dates for birthdays, anniversaries, and graduations you want to be part of, even if you can't be there in person. The day before delivery, you can cancel the message if you're sure you'll be able to congratulate your loved one in person.
- Use near-term dates for anything urgent – passwords, account access, care instructions – so your Guardians can act quickly if something happens to you.
- Review your older scheduled messages from time to time. Life changes, and your messages should change with it.

> **HOW IT WORKS:** You can postpone any scheduled delivery if you're still around — unlimited postponements are included. If you don't respond in time, the delivery happens automatically.

06 Track What You've Scheduled

Go to **Scheduled Deliveries** anytime to see everything that's waiting to be sent.

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- Use the **Scheduled, Delivered,** and **All** tabs to check the status briefly
- Use the search bar to quickly find a specific message as your list grows.
- Edit a message before its delivery date if the details change.

07 Make It a Habit, Not a One-Time Task

Your main dashboard shows **Messages Preserved**, **Templates,** and **Guardians** as numbers, along with your **Protection Status** and **Days Protected** — a simple way to see how prepared you are.

- Revisit your account after any major life change: a move, a new family member, a new account or password, a new job.
- Check in a few times a year, even if nothing has changed, just to confirm everything is still accurate.
- Explore **MyLegacy University**, accessible from your Dashboard, for more ideas on getting the most out of the app.

> **HABIT:** Set a recurring reminder on your calendar every six months: "Review MyLegacy." It takes less than 10 minutes and keeps everything current.

Tips by Situation

Tips tailored to your lifestyle and circumstances

Families

Schedule messages for milestones you might miss. Make sure your partner and children know who your Guardians are and what they'll receive.

Travelers and Digital Nomads

Keep an emergency contact message and location instructions ready to send if plans change unexpectedly. Set your time zone before each trip.

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🛡 Military Members and High-Risk Professions

Prepare messages before deployments or high-risk assignments. Use recurring update templates so your family is never left without guidance.

💼 Business Owners

Create a business handoff template with account access, next steps, and key contacts for your team or successor.

What You Can Include in Your Messages

- ✓ **Legal and financial:** Mention where your will is, whether there are trusts or property deeds, and your lawyer's contact — MyLegacy delivers the instruction, not the document.
- ✓ **Insurance and banking:** Note which policies you have, with which bank, and who to call — no need to share passwords inside the message.
- ✓ **Digital access:** Instructions for recovering access to your most important accounts.
- ✓ **Health and care:** Your wishes for medical care and instructions for dependents' care.
- ✓ **Personal messages:** Final words, birthday messages, graduation notes, life advice.
- ✓ **Business continuity:** Who to notify, which accounts to review, and next steps for your team.

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A Few Minutes Today, Peace of Mind for Years

MyLegacy works best when it's part of your routine, not a last-minute task. Set it up once, review it a few times a year, and let it carry your words to the people who need them — exactly when they need them.

Start today → app.ismylegacy.app

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