

REGISTER YOUR ONLINE PORTAL ACCOUNT

Our online portal gives you 24-hour self-service access to view policy information, trust account reports, and the trust cash balance of accounts. Signing up is simple! Follow the steps below to register today.

STEP 1: VISIT PORTAL REGISTRATION PAGE



Visit **portal.lifeintrust.com/register** OR scan the QR code to the left using your phone's camera and click the "register" button.

STEP 2: USE YOUR EMAIL TO START REGISTRATION



As an advisor, you will enter your professional email into the email field and continue following registration set up steps.

 Email Address

NEED ASSISTANCE?

Please follow the detailed guide on the next few pages. If at any point during the process you require additional assistance, please call us at **888-320-9594**

LITCO ONLINE PORTAL GUIDE

CHOOSING A REGISTRATION METHOD

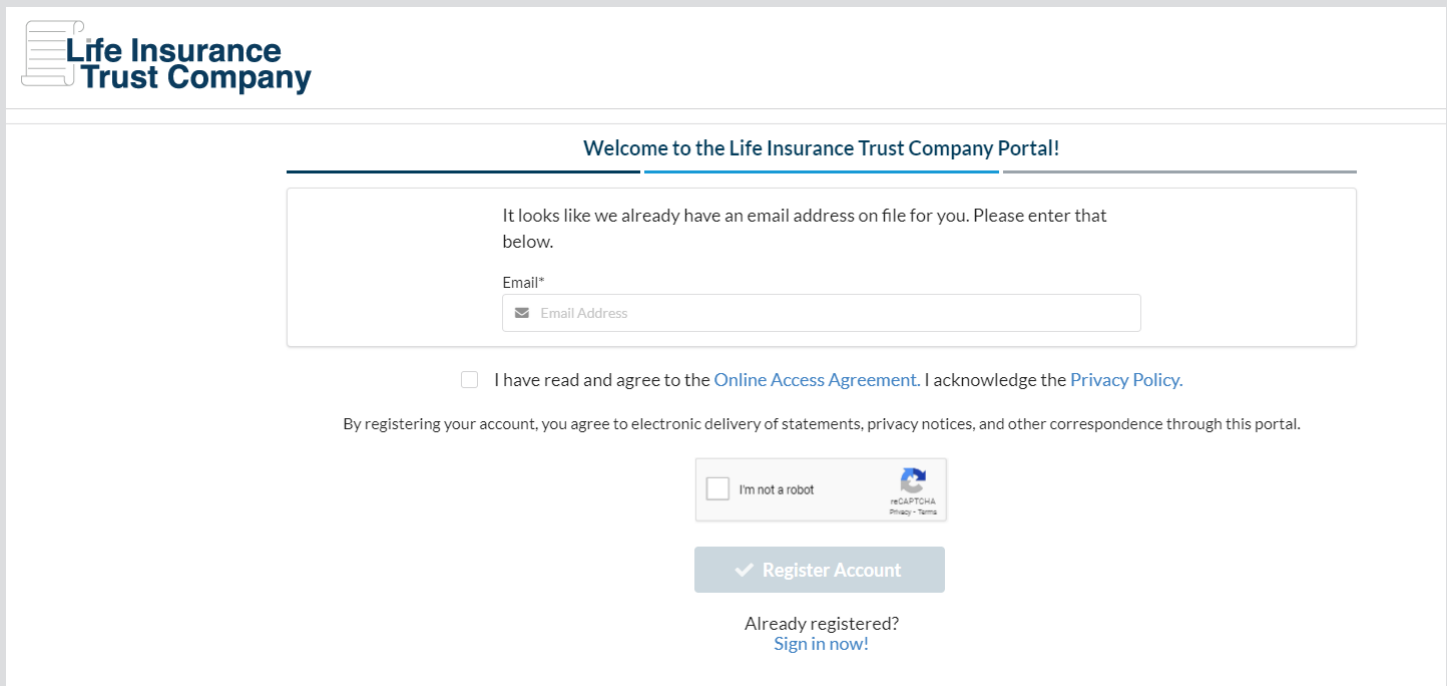
The screenshot shows the registration page for the Life Insurance Trust Company portal. At the top left is the company logo, and at the top right is a 'Support' link. The main heading reads 'Welcome to the Life Insurance Trust Company Portal!'. Below this, a box prompts the user to 'Please select desired option to begin your registration process.' There are two options: 1) 'If you received a letter in the mail, use the Access Code in the upper right corner of the letter', which includes an 'Access Code*' input field with a placeholder '</> AccessCode' and a 'Next' button. 2) 'If you received an email from us, use the receive email address to register', which includes an 'Email*' input field with a placeholder 'Email Address'. An 'OR' is placed between the two options. Below the options is a checkbox for 'I have read and agree to the Online Access Agreement. I acknowledge the Privacy Policy.' followed by a line of text: 'By registering your account, you agree to electronic delivery of statements, privacy notices, and other correspondence through this portal.' Below this is a CAPTCHA box with 'I'm not a robot' and a 'Register Account' button with a checkmark. At the bottom, there is a link for 'Already registered? Sign in now!'.

To register your account, you will need either an access code **OR** an email address on file with Life Insurance Trust Company.

- As an advisor, you will need to register using your professional email address.
- If you received a letter with an access code in the mail, you should still use your email address to register.

LITCO ONLINE PORTAL GUIDE

REGISTERING WITH AN ACCESS CODE



Life Insurance Trust Company

Welcome to the Life Insurance Trust Company Portal!


It looks like we already have an email address on file for you. Please enter that below.

Email*

Email Address

☐ I have read and agree to the [Online Access Agreement](#). I acknowledge the [Privacy Policy](#).

By registering your account, you agree to electronic delivery of statements, privacy notices, and other correspondence through this portal.

☐ I'm not a robot 

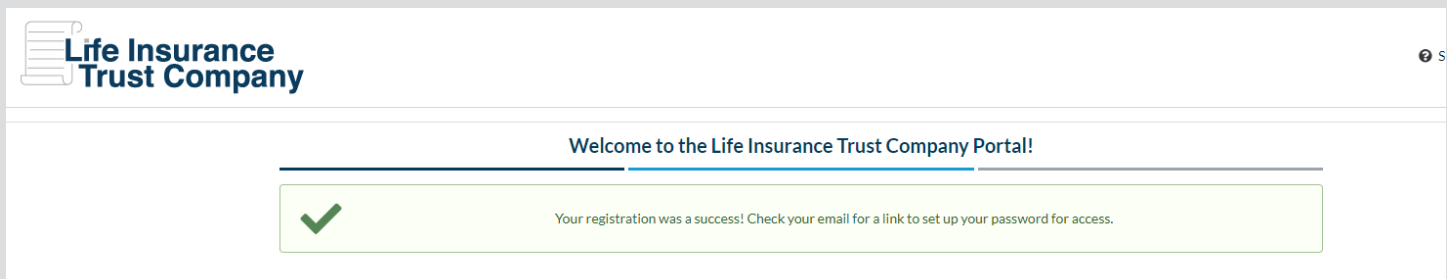
reCAPTCHA
Privacy - Terms

✓ Register Account

Already registered?
[Sign in now!](#)

If you attempt to register using an access code, but are an advisor with an email address already on file, you will be redirected to this screen to register with that email.

SUCCESSFUL REGISTRATION



Life Insurance Trust Company

Welcome to the Life Insurance Trust Company Portal!

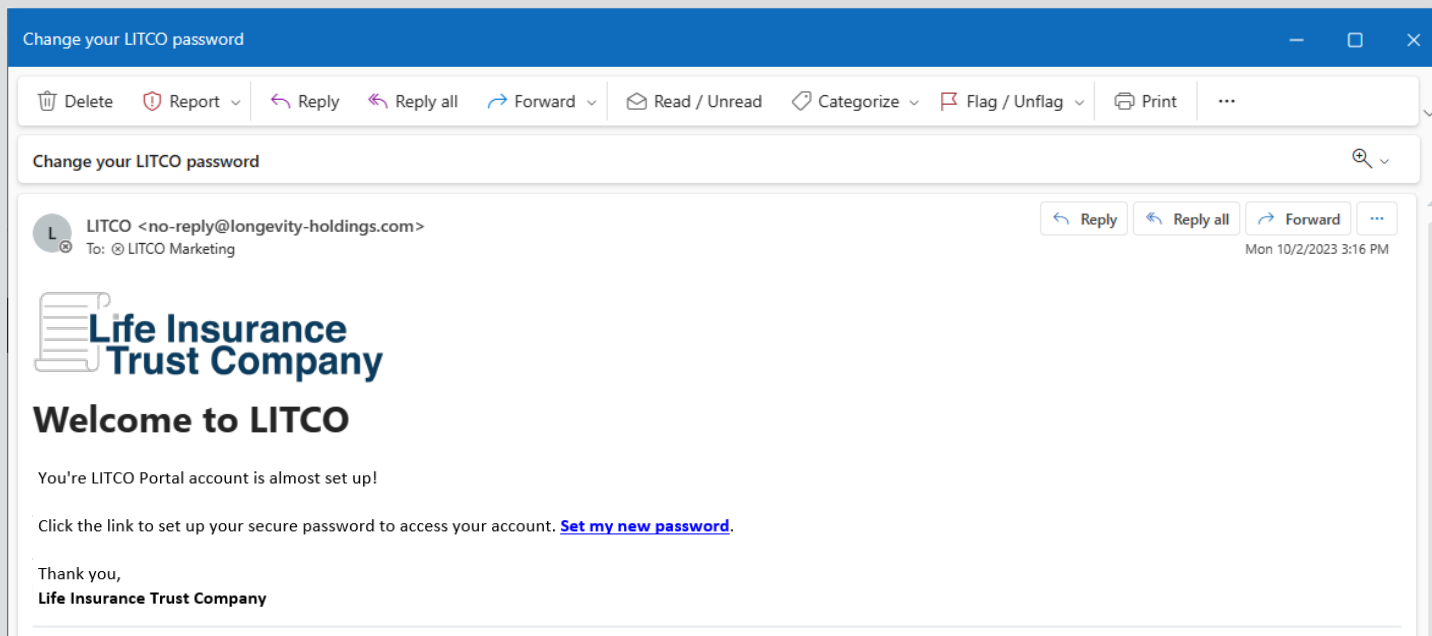
✓

Your registration was a success! Check your email for a link to set up your password for access.

Once your registration has been completed, you will see this welcome message.

LITCO ONLINE PORTAL GUIDE


SETTING YOUR PASSWORD



Upon completing your registration, you will receive an email from LITCO to set up a new password. Follow the link in the email to create your portal password.

LITCO ONLINE PORTAL GUIDE

PORTAL DASHBOARD



[Support](#)[Home](#)[Logout](#)

[Grantor](#)[Beneficiary Resources](#)[Blog](#)[TOLI Handbook](#)

Dashboard

Trusts

Search...

Trust Name	Account #	Account Role	Cash Balance	Policies
smith	123456	Beneficiary	Searching...	1

Actions Needed

Search...

Notification Date	Link	Account #	Action Needed
No records available			

10

items per page

0 - 0 of 0 items


Document history can be viewed in the trust.

Once you have set your password, you will be logged into your account dashboard. From here, you can see each of your client's trusts listed under the "Trusts" section, and any notifications will be listed under the "Actions Needed" section.

To see more detailed information, click into any trust or any notification.

LITCO ONLINE PORTAL GUIDE

TRUST DETAILS



[Support](#)[Home](#)[Logout](#)

[Grantor](#)[Beneficiary Resources](#)[Blog](#)[TOLI Handbook](#)

smith
Trust Account Number: 123456
Searching...

[Overview](#)[Documents](#)[Transaction History](#)

Trust Details

Trust Account Number	123456
Trust Status	Active
Trust Agreement Date	6/30/2023
Trust Start Date	6/23/2023
Trust Cash Balance	Searching...
Trust Cash Balance As Of Date	

Polices

▼ Northwestern Mutual (Brandiet - PA)

Policy Number	smith 123456
Policy Type	Whole Term Blend
Policy Status	Pre-Acceptance
Carrier	Northwestern Mutual
Net Death Benefit	\$3,000,000.00
Last Premium Paid Date	No Data
Next Premium Due Date	6/23/2023
Next Premium Due Amount	\$85,001.00

Tax Information

TaxID	1234 ⓘ
Trustee Investment Authority	No Data

Contacts

> Jane Smith (Beneficiary)

> John Smith (Beneficiary)

> Jack Smith (Beneficiary)

> Jessica Smith (Beneficiary)

> Jeff Smith (Beneficiary)

When you click into any trust from the dashboard, you will be able to see more details.

The overview page contains general information such as trust details, policy info, tax info, and trust contacts.

Trust documents, such as the Trust Account Report, can be found in the documents tab of each trust.

You can check the transaction history of any trust by navigating to the transaction history tab within the trust.