litco
Life Insurance Trust Company

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

SCAN TO ACCES PORTAL

Visit **portal.lifeinstrust.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

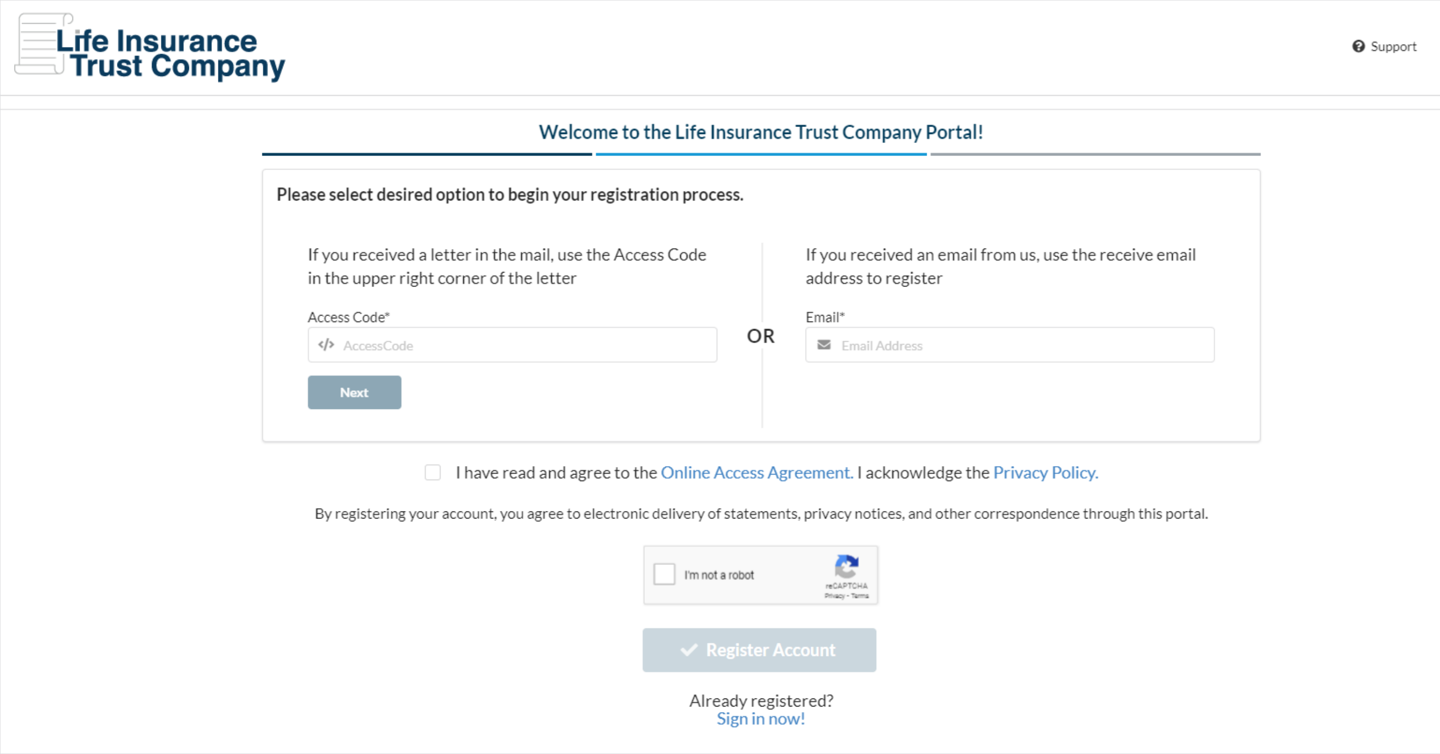
As an advisor, you will enter your professional email into the email field and continue following registration set up steps.

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**

CHOOSING A REGISTRATION METHOD

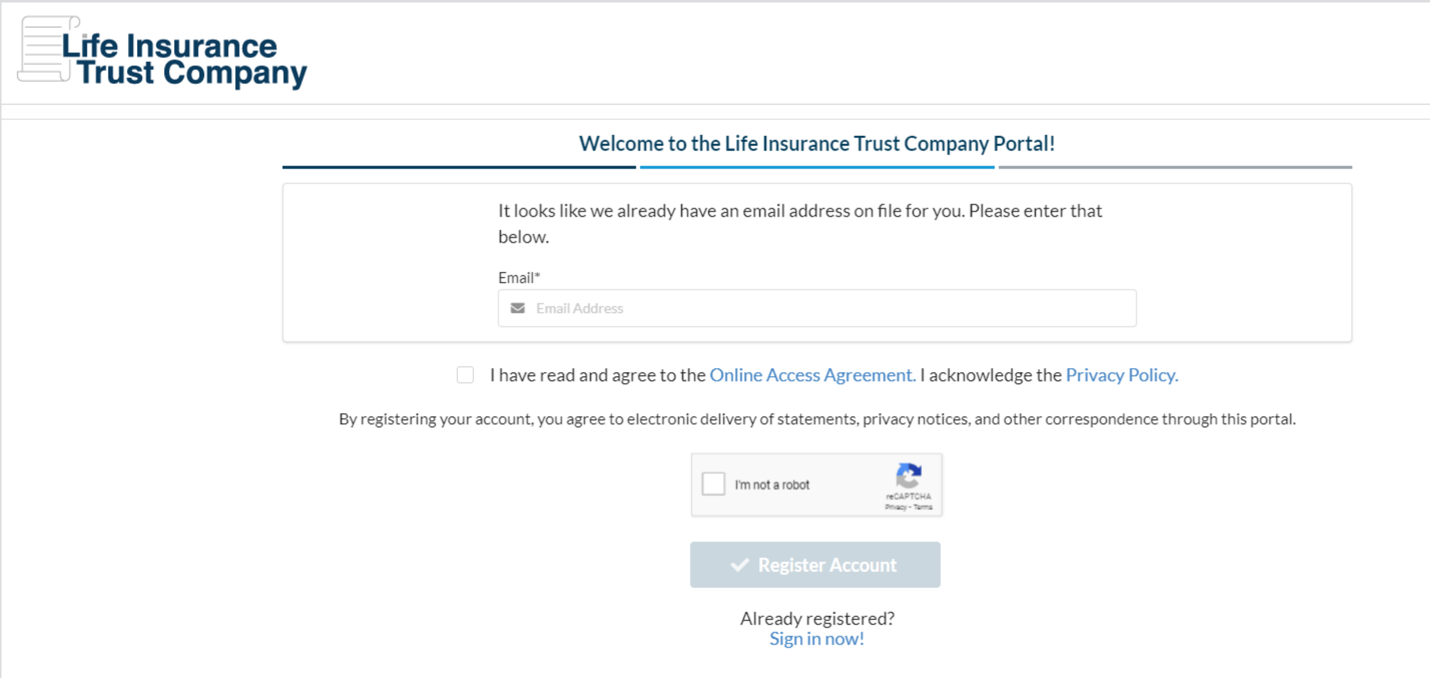


To register your account, you will need either an access code **OR** an email address on file with Life Insurance Trust Company.

- 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.

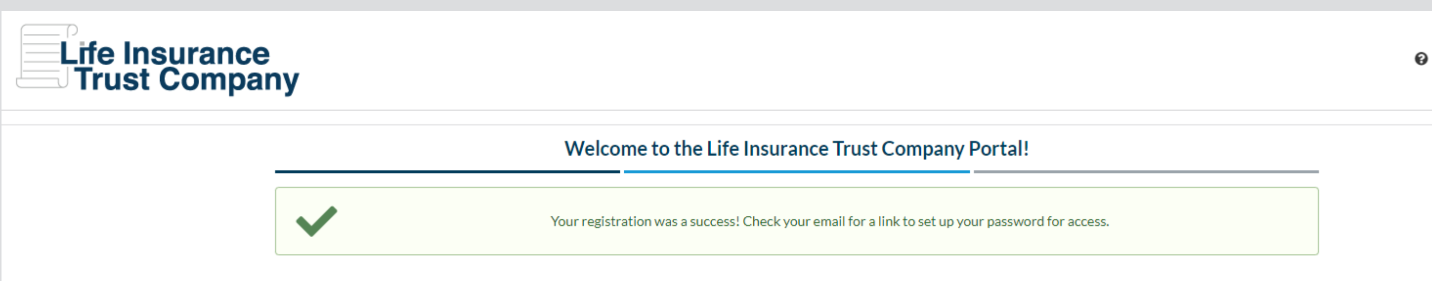
LITCO ONLINE PORTAL GUIDE

REGISTERING WITH AN ACCESS CODE



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.

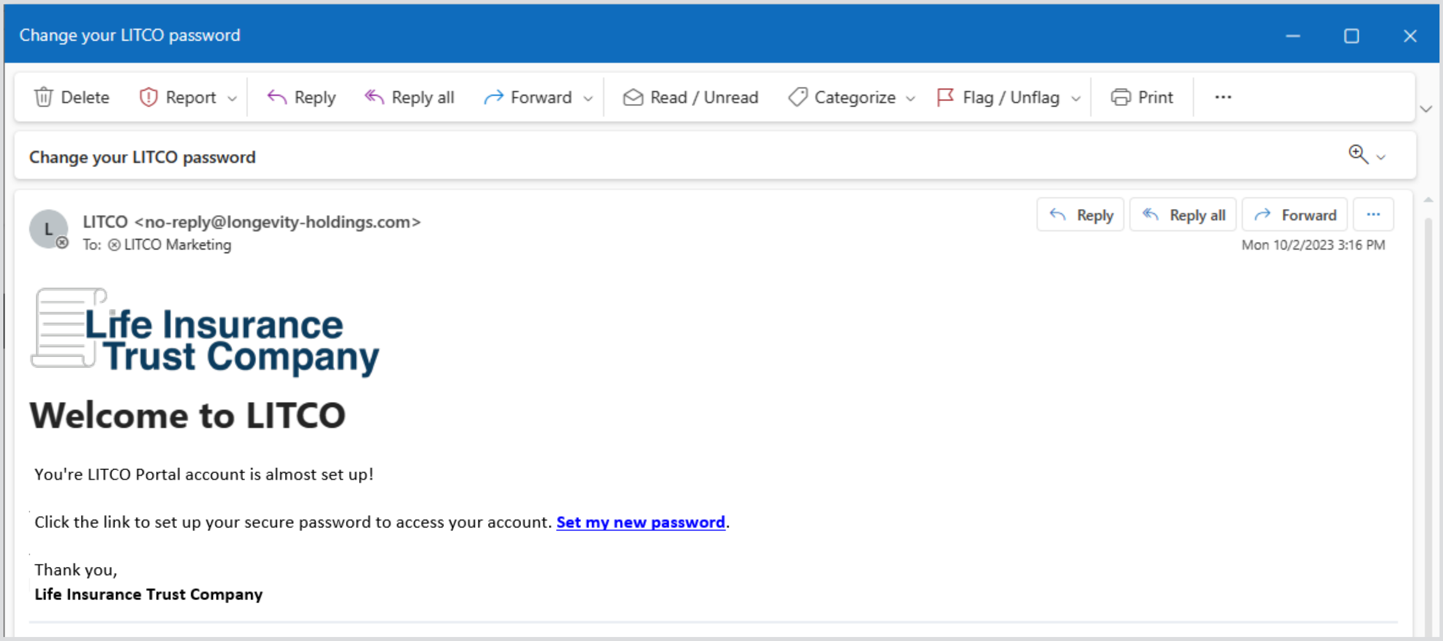
SUCCESSFUL REGISTRATION



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

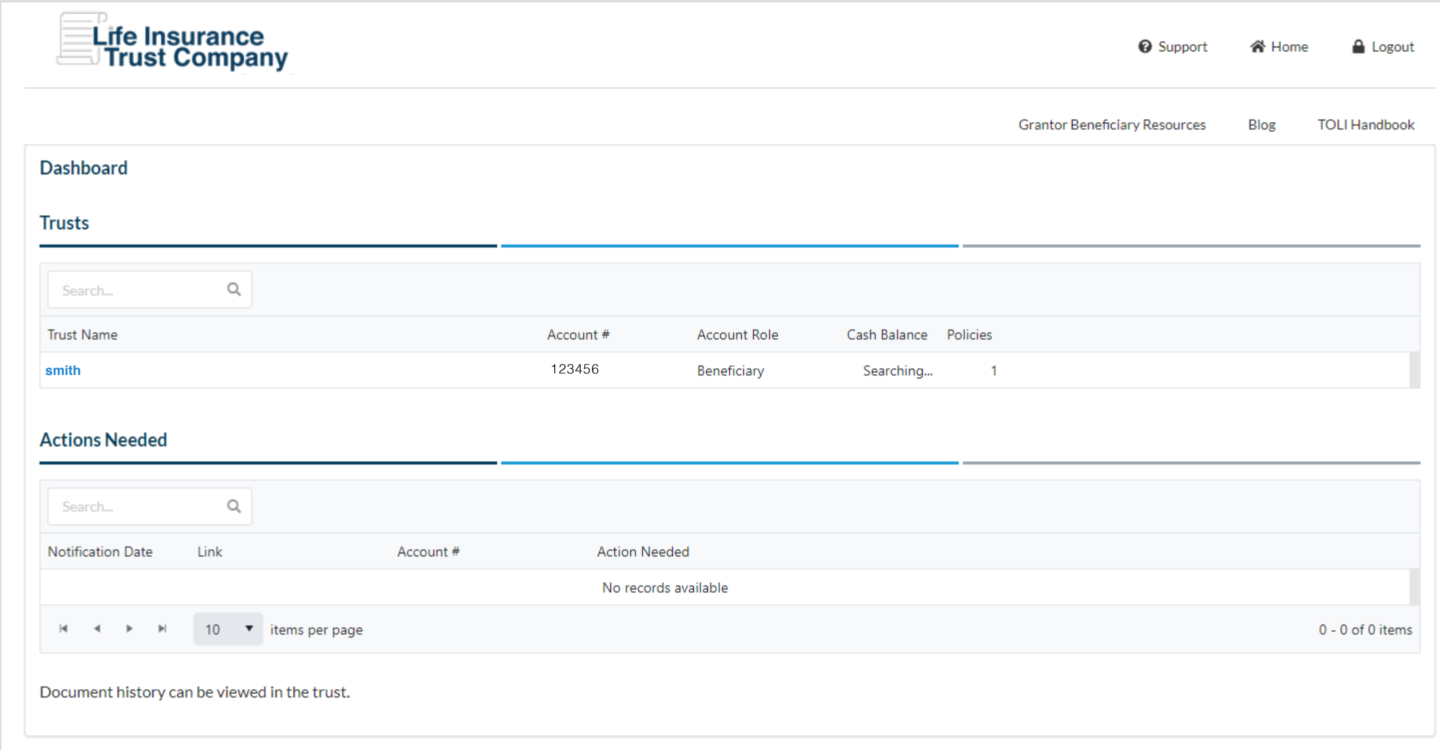
PORTAL.LIFEINSTRUST.COM/REGISTER
INFO@LIFEINSURANCETRUSTCO.COM
888.320.9594

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.

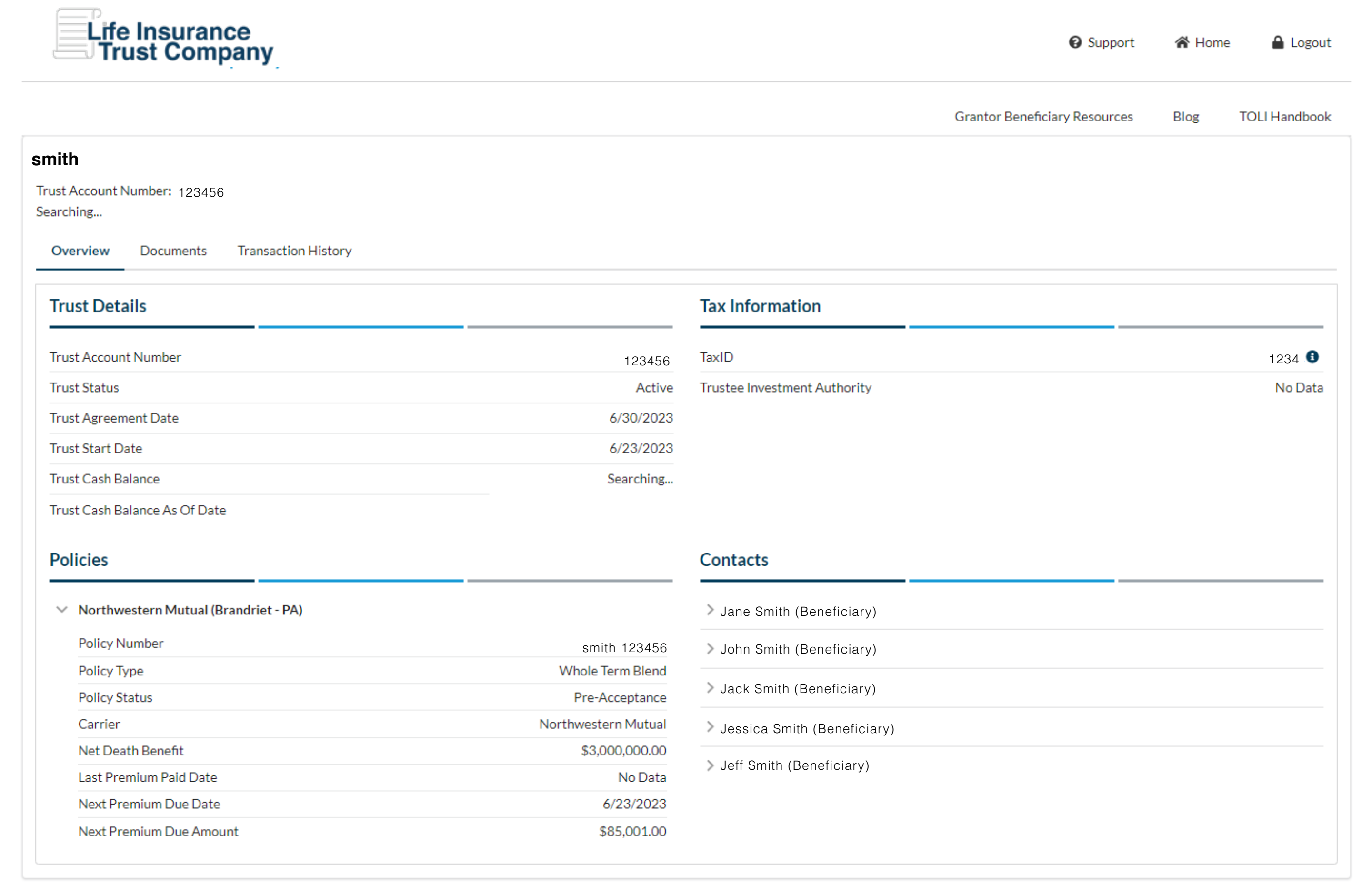
PORTAL DASHBOARD



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.

TRUST DETAILS



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.