



Sign in to your account

Email

1

your email address

regina@estateplan.org

Password

2

Forgotten password?

.....

Sign in



Sign in with Microsoft



Sign in with Google

Reset Password

Will be your email address

Email Address *

regina@estateplan.org

NEW Password *

.....

Click this box with the dots and type your new password with at least 6 characters

Confirm NEW Password *

Next click in this box and enter that same password



Security Image *

Next type the numbers and letters you see above in this box

Save Changes

Then click save changes

Password Policy

When changing your password it must meet these minimum standards.

- Minimum length of 6 characters

This will take you to the log in screen again



Sign in to your account

Email

Your email address

regina@estateplan.org

Password

[Forgotten password?](#)

.....

Type the new email
you just saved

Sign in

Then sign in



Sign in with Microsoft



Sign in with Google

Sample, William & Mary - MAINT EMP Legacy

ID: 965 [View another Matter](#)

Status Documents Messages Activity



Click on the Documents tab

Your Status will appear here.

Sample, William & Mary - MAINT EMP Legacy

ID: 965 [View another Matter](#)

- Status
- Documents ¹
- Messages
- Activity

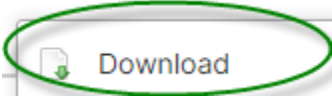
Download (to Client) Upload

FILE	SIZE	MODIFIED
 Estate Planning Review Worksheet Sample, Bill 2023-06-01.pdf	207 KB	5 days ago

Portal Upload Documents

This folder is currently empty.

Upload (to Law Firm) Upload Documents




Sample, William & Mary - MAINT EMP Legacy


ID: 965 [View another Matter](#)

- Status
- Documents** ¹
- Messages
- Activity

01.pdf

 **Portal** Upload Documents

This folder is currently empty.

 **Upload (to Law Firm)** Upload Documents

Once you have a prinout marked up and saved as a file, upload the document here, by clicking on the Upload Documents button and finding the file from your computer.

If you cannot scan and upload, mail the printed and marked up file to our office.