

# User Guide

## Family Love Letter User's Guide

### 1. Getting Started

#### 1.1 About Family Love Letter thumb drive

The Family Love Letter thumb drive allows individuals to give their families a lasting and important gift – all the vital information loved ones need to know in case of sudden incapacitation or death. These individuals are literally making plans and taking inventory on behalf of their families – financially and otherwise. The Family Love Letter thumb drive includes everything from key contact information for lawyers and accountants to insurance policies to statements of ethics to funeral requests.

The Family Love Letter thumb drive program runs directly from your Family Love Letter thumb drive. There are no application files to install. (Note: Adobe AIR is required to run the Family Love Letter thumb drive and is covered further in the Requirements section.)

The Family Love Letter thumb drive interface helps you record your vital information with an easy step by step interface.

All information collected is stored on the Family Love Letter thumb drive, which is encrypted and password protected, keeping your most sensitive information safe and secure. Note: The Resources folder is located outside of the Family Love Letter, so information stored here will not be encrypted or password protected (See section 1.4 below). When you have completed entering all your information onto the Family Love Letter thumb drive, **all information is automatically saved**. Then simply eject the thumb drive from your computer and store it in a safe place.

#### 1.2 Installation Instructions

1. Download and install Adobe Air at <https://get.adobe.com/air/>
2. Once installed, follow these instructions to install the Family Love Letter application based on your operating system.

**For Windows users:**

3. Insert the Family Love Letter thumb drive into your computer
4. In Windows Explorer, Go to C:\Program Files (x86)\Common Files\Adobe AIRVersions\1.0
5. While holding the “Ctrl” key, select the Adobe AIR Application Installer.exe -> Right click on it -> Run as Administrator. Do not take your finger off the “ctrl” key until you see the window open up.
6. Select and open the Install\_Family\_Love\_Letter.air file located on the thumb drive in

the WINDOWS folder.

7. Follow the remaining install prompts

### **On a MAC**

3. Insert the Family Love Letter thumb drive into your computer

4. Go to /Applications/Utilities

5. While holding the “command” key, double click on the Adobe AIR Application Installer. Do not take your finger off the “command” key until you see the window open up.

6. Select and open the Install\_Family\_Love\_Letter.air file located on the thumb drive in the MAC folder.

7. Follow the remaining install prompts

## 1.3 Launching the Family Love Letter Menu

To run the Family Love Letter thumb drive, you will first need to access the Family Love Letter Menu. In order to do this, follow these steps:

1. Place the Family Love Letter thumb drive into an available USB port on your PC.
2. A launch window will appear, asking what you would like to do with the thumb drive. Select “Launch Family Love Letter Menu” from the list and click OK. **(Note: If your system does not allow auto launching programs from the thumb drive, you may need to manually launch the Family Love Letter Menu by following these steps:**
  1. Open “My Computer” and look for the thumb drive labeled with the “Family Love Letter” label and icon listed in the available drives.
  2. Double-click on the Family Love Letter thumb drive. It should be marked with the “Family Love Letter” label and icon.
  3. Once the Family Love Letter thumb drive is open, double-click on the “Launch\_Family\_Love\_Letter\_Menu” option.
  4. The Family Love Letter Menu will open.
3. The Family Love Letter Menu will appear (shown in Figure 1).

## 1.4 Using the Family Love Letter Menu

The Family Love Letter Menu helps you access the information contained on the Family Love Letter thumb drive. The following are menu items:

- **Open Family Love Letter**

This opens the Family Love Letter program and begins walking you through the process of recording your vital information. A more detailed explanation of this is covered in the “Running the Family Love Letter” section below. **Important!** Make sure you have clicked the Install Adobe AIR menu item link below before clicking “Open Family Love Letter.” Adobe AIR needs to be installed before the Family Love Letter program will run.

- **Additional Resources**

This section takes you to an area on the Family Love Letter thumb drive containing additional resources like spreadsheets, videos, handouts, etc. You can also place your important files and documents in this folder. (Note: The files stored in this folder are not encrypted or password protected.)

- **User’s Guide**

This link takes you to an online version of this documentation.

- **Install Adobe Air**

The Family Love Letter thumb drive program requires the Adobe AIR framework to be installed on your computer. Simply click on this link to start the Adobe Air install process and follow the prompts displayed. If you already have Adobe AIR installed on your computer, the installation process will detect this and notify you via a prompt.

- **Visit Our Web Site**

Click this link to access the Family Love Letter website.

## 2. Running the Family Love Letter

Clicking the “Open Family Love Letter” menu item will open the Family Love Letter main program. This section describes how to navigate and enter information into the Family Love Letter program.

**Important! Make sure you have clicked the Install Adobe AIR link on the Family Love Letter thumb drive menu before running the Family Love Letter. Adobe AIR needs to be installed before the Family Love Letter program will run.**

## 2.1 Running for the first time

The first time you run the Family Love Letter, a few Welcome screens will be displayed that will only show the first time. These Welcome screens include Accepting Terms and Conditions and Creating Your Family Love Letter Password.

### 2.1.1 Accepting Terms and Conditions

The Welcome screen (Figure 2) will display the first time you run the Family Love Letter. This screen displays a welcome message and terms and conditions. You will need to click the “I accept the Family Love Letter Terms and Conditions” box and then click “Continue” to enter into the program.

### 2.1.2 Creating Your Family Love Letter Password

After accepting the Terms and Conditions, you will create a password that will protect your Family Love Letter data (Figure 3). This password will have to be entered everytime you run the Family Love Letter application so be sure to choose a password that is secure and easily remembered by you.

Also, use the “Password Hint” box to enter a phrase or question that will help you remember your password in case you forget it. **Note: Be sure you can remember your password or answer your password hint, because there is no other way to recover your password if you forget it.**

Once your password and password hint have been entered, click “Launch Family Love Letter” to access the Family Love Letter program.

## 2.2 Logging into the Family Love Letter

When presented with the Family Love Letter Login screen (Figure 4), you will need to enter the password created the first time you ran the program.

After your password is entered, click “Login”. If you need help remembering your password, click the “Password Hint” button to bring up the hint or question you entered when you first ran the program.

## 2.3 Family Love Letter Main Menu

The Family Love Letter Main Menu screen (Figure 5) has links to the six main sections of the Family Love Letter application across the top of the screen. These main sections are:

- Introduction
- Advisors & Assets
- Financial Information
- Insurance & Benefits
- Documents
- Family History

Click on a main section menu button to begin entering information that relates to that section. Note: No personal information is input in the Introduction section since it is a link to an online PDF.

## 2.4 Family Love Letter Section

A section in the Family Love Letter helps group together related information and allows you to enter data (Figure 6). For example, the Advisors & Assets section contains information regarding financial advisors, doctors, employers, bank accounts, real estate, etc.

A section will have a Navigation area displayed on the left side of the screen and an Input screen displayed on the right side of the screen. (Figure 6.)

### 2.4.1 Section Navigation

When you are in a section, the left side of the screen contains the section navigation (Figure 7) that allows you to see all of the categories in that section (Advisors, Investment Strategy, Stocks and Securities, etc.) and access the screens that are in each category (Brokerage Accounts, Individual Stocks, Bonds) when each section is expanded.

Click on a category name to expand that category and see the screens listed below it. Click on any screen name to access that input screen.

## 2.4.2 Input Screen

When you are in a section, the right side of the screen contains the input screen (Figure 8). Each screen has fields that will help lead you as you record your vital information. You may enter as much or as little information as you want. The fields are free of formatting, which enables you to input the information in a way that best suits your needs. You are also able to paste text into each field that has been copied from a different program.

Once you have recorded the necessary information on that screen, simply hit the “Next” button. **At this point, your information will be saved immediately and will be available the next time you access this screen and the Family Love Letter thumb drive.**

Click the “Previous” button to go back to the previous screen. Click “Main Menu” to return to the Family Love Letter Main Menu screen.

## 2.4.2 Grouping data on an Input Screen with tabs

On some Input Screens, you will see a Tab with a number at the top (Figure 8). You will also notice the fields under that tab are grouped together. This is called a data grouping and allows you to input multiple instances of certain data.

If you look below the grouped fields, you will see an “Add Another Tab” button (Figure 9). Clicking this button duplicates the grouped fields and allows you to enter another set of data (for example, if you have two doctors, or if you would like to enter another set of data for your spouse.)

If you want to remove a tab, click on the tab you want removed and hit the “Remove Current Tab” button.

## 2.5 Tools

On the Family Love Letter Main Menu screen, you will see a “Tools” button in the bottom left corner. Click this button to access the Tools screen (figure 11).

On the Tools screen you can:

- Change the Signature “From” name and “Effective Date” that are displayed on the Family Love Letter Main Menu.
- Change your password or password hint.

- Export the Family Love Letter questions and answers to a PDF. **Note: Due to the sensitive information contained in this PDF, Family Love Letter recommends you delete the pdf from your desktop after printing. If you choose not to delete the PDF, please store it in a secure location for your protection.**
- Backup your Family Love Letter data file. (Details covered in section [3.1 Backing up Family Love Letter data](#).)

## 3. Backup and Storage

### 3.1 Backing up Family Love Letter data

At any time, you can create a backup of the Family Love Letter data by accessing the Tools menu's Data Backup tab and clicking the "Backup Family Love Letter data" button.

Clicking this button will make a copy of your Family Love Letter data file and place it on your Window's desktop. The file will be named *MyFamilyLoveLetter\_Backup\_ today's date.xml*. This data file backup is an encrypted file that can only be read by the Family Love Letter thumb drive. The purpose of this backup is to provide you with the ability to restore your Family Love Letter data in the unlikely event of your Family Love Letter thumb drive becoming damaged or corrupt. If this happens, you will need to contact Family Love Letter and have them walk you through restoring your Family Love Letter data backup file.

Once this file has been created, you will need to store it with your normal system backups.

### 3.2 Family Love Letter thumb drive storage and care

Below are some general tips to help you keep your Family Love Letter thumb drive safe.

- Environmental Factors – Water, heat, and shock are all factors that may ruin your Family Love Letter thumb drive, with water being the largest opponent. Exposure to heat is also not recommended. If the thumb drive becomes too hot or is exposed to high temperatures frequently and/or for a long period of time, the storage cells inside the flash memory may be affected. The heat could possibly

delete or damage data if exposed for too long. Shock is also a factor to consider. Continued slamming, smashing, or dropping of the thumb drive, even though cased, may damage it. Keeping the thumb drive in a case and using it with some care will help prevent any breakage or loosening of pieces.

- Viruses & Malware – Although viruses and malware won't physically ruin your thumb drive, they may be transferred to another computer by it. Plugging your thumb drive into an unfamiliar computer's USB port may offer a virus or malware a free ride to your thumb drive's next visit. Only use your Family Love Letter thumb drive in trusted computers.
- Loose Pieces – Many people opt to carry their thumb drive on a key chain or in their pockets thinking that their thumb drive will not be harmed. Keep in mind, though, that constant battering by outside objects could damage your thumb drive. **It is recommended that you store your Family Love Letter thumb drive in a safe place and not carry it with you on a daily basis.**
- Disconnecting your Family Love Letter thumb drive – Always use the correct method in windows to unload the device by clicking on 'Remove Device Safely'.