



How to *Add Elders* to Your LegalShield Account

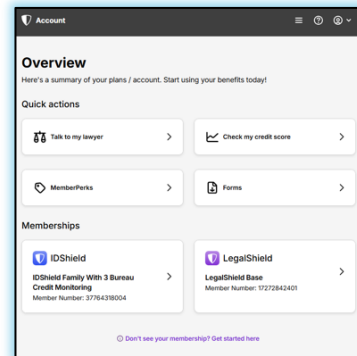
Quick Reference Guide

Your LegalShield plan allows you to add parents, in-laws, or step-parents to your coverage (referred to as "Elders").

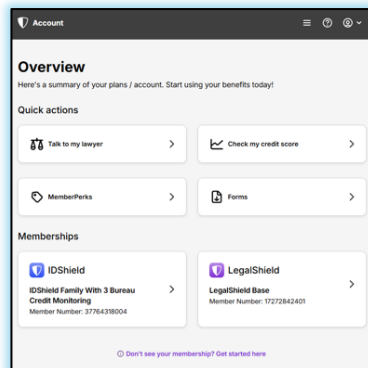
When you add an Elder, they'll receive their own account where they can independently manage and track their legal requests, contact your law firm by phone or through the member portal, and access services through the LegalShield mobile app.

Getting Started: Logging In & Navigation

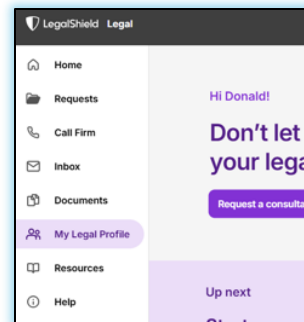
1. Log in to your account at accounts.legalshield.com



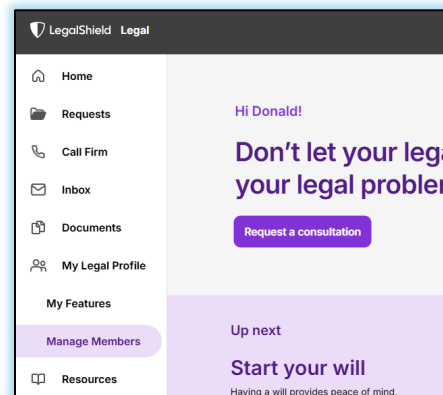
2. Select your **Legal Plan** to open the member portal.



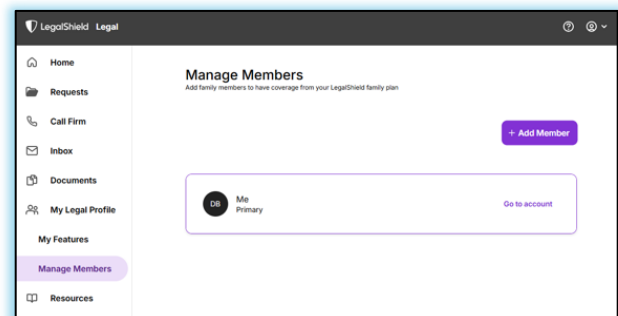
3. Navigate to **My Legal Profile** in the left-hand menu.



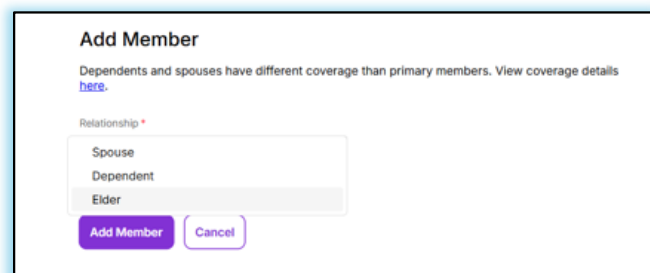
4. Select **Manage Members** within the left-hand navigation.



5. Select **Manage Members**, Click the **+Add Member** button within the left-hand navigation.

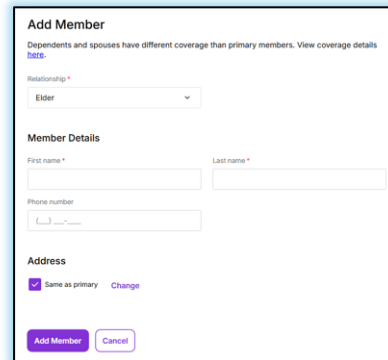


6. Select **"Elder"** for the Relationship option.



7. Complete the Member Details section:

- **Phone number:** Optional but recommended. Adding it helps ensure the law firm can reach the member directly.
- **Address:** Can be updated or left the same as the primary member. This info helps determine whether the added member may need support from a law firm in a different state, since laws and legal processes can vary state-to-state. **Click Add Member** to save the details.

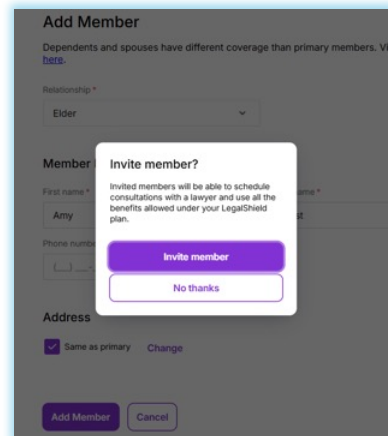


The 'Add Member' form includes a title bar, a note about coverage for dependents and spouses, a 'Relationship' dropdown menu set to 'Elder', and a 'Member Details' section with fields for 'First name', 'Last name', and 'Phone number'. Below this is an 'Address' section with a checked 'Same as primary' option and a 'Change' link. At the bottom are 'Add Member' and 'Cancel' buttons.

Sending & Completing the Invitation

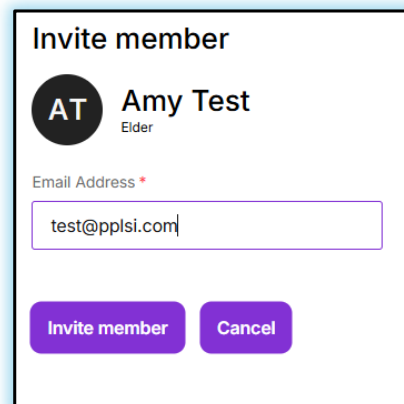
8. When prompted "Invite member?":

Click Invite member so they can create their own account and independently request and track legal services. Select "No thanks" only when adding individuals like dependents who do not require their own account.



This screenshot shows the 'Add Member' form with a modal dialog box titled 'Invite member?'. The modal contains the text: 'Invited members will be able to schedule consultations with a lawyer and use all the benefits allowed under your LegalShield plan.' It has two buttons: 'Invite member' and 'No thanks'.

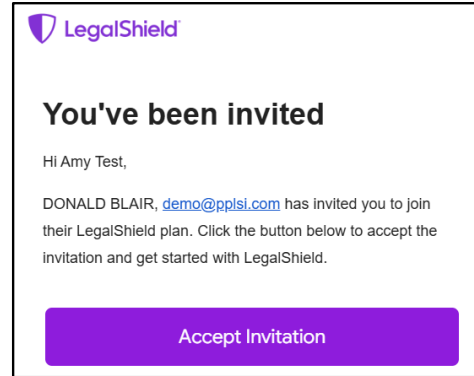
9. Enter the Elder's email address and click **Invite member**.



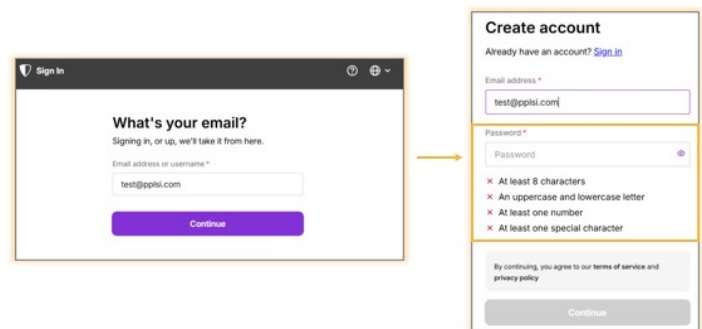
The 'Invite member' modal shows a profile card for 'Amy Test' with the title 'Elder' and a circular avatar with the initials 'AT'. Below the card is an 'Email Address' field containing 'test@pplsi.com'. At the bottom are 'Invite member' and 'Cancel' buttons.

What Happens Next

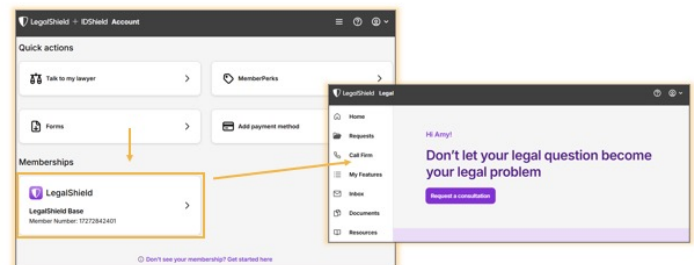
- 10. The Elder receives** an email invitation from LegalShield (noreply@pplsi.com) inviting them to join the plan. They must click **Accept Invitation** to proceed.



- 11. Account setup:** They'll be directed to the account sign-in page, where they'll set a password using the same email address that received the invitation.

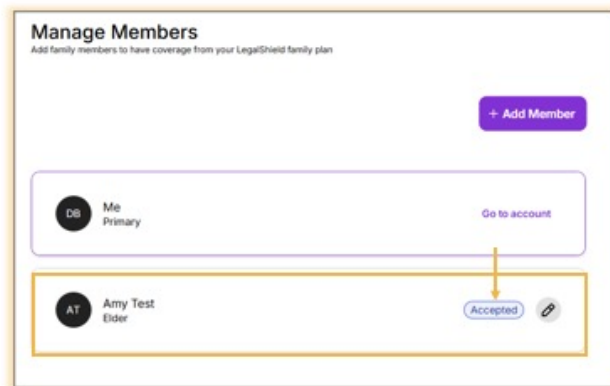


- 12. Portal Access:** After creating their account, they'll see their LegalShield plan listed and can access their portal to contact the law firm at any time.



- 13. Mobile app:** The same email and password credentials also work in the LegalShield mobile app for easy access across platforms

- 14. Confirmation:** You'll see an "Accepted" status appear in your Manage Members section once the invited member completes their invitation.



Need help?

Contact LegalShield member support for assistance with adding Elders to your account: memberservices@legalshield.com