

Legacy Planning Template [modify to meet your needs]

Accounts, Utilities, Medical & Legal

- I have provided a list of companies and accounts (not including financial) to [person's name] so that they can notify each company/cancel accounts in the event of my death.
- Access to financial accounts is included in my files and media plans.

Email

- I have used the gmail legacy feature to set up automatic deletion of my account after 6 months of inactivity.
- My Yahoo account has no legacy controls and will be deleted after a period of inactivity.
- I have provided [person's name] with a list of email accounts and my wishes that no one attempt to access them (allow them to be deleted).

Files & Media

- I have shared my computer login with [person's name], and will update them annually when I change my login information after the New Year. This individual has my permission to access my computer to get pertinent documents, including bank statements, family photos, and insurance information. Any files that are private and/or personal are password protected and access should not be attempted. I trust this individual to share and distribute my files as they see appropriate, and to delete any password-protected files according to my wishes.
- I have a document on my desktop called "If I die" which is password protected. I have also shared this document with [person's name] and the password does not change. The document contains:
 - bank account numbers
 - life insurance
 - retirement accounts
 - personal blog and domain name login information (& directions for each)
 - list of people I would like contacted if I pass away

Social Media

- I have designated [person's name] to be the executor of my Facebook memorial page using the Facebook legacy controls.

