

Digital Legacy: Securing Your Online Presence





Email Accounts: Google (Gmail)

1

Set Up Inactive Account Manager

Configure the Inactive Account Manager to manage your Gmail account after inactivity.

2

Add Trusted Contacts

Add trusted contacts to manage your Gmail account when it becomes inactive.

3

Customize Data Sharing

Choose specific data and permissions for your trusted contacts to access.



General Accounts: Google



1

Set Up Inactive Account Manager

Configure Google's Inactive Account Manager to manage your account after inactivity.

2

Add Trusted Contacts

Select up to 10 trusted contacts who can access your Google account when inactive.

3

Customize Data Sharing

Choose specific data and permissions for your trusted contacts to access.



Email Accounts: Microsoft (Outlook/Hotmail)

1

Update Security Information

Keep your security information current for your Outlook/Hotmail accounts.

2

Inform Executor

Notify your executor about your Microsoft email accounts and provide necessary access details.

3

Review Account Settings

Regularly review and update your Microsoft email account settings for easier posthumous management.



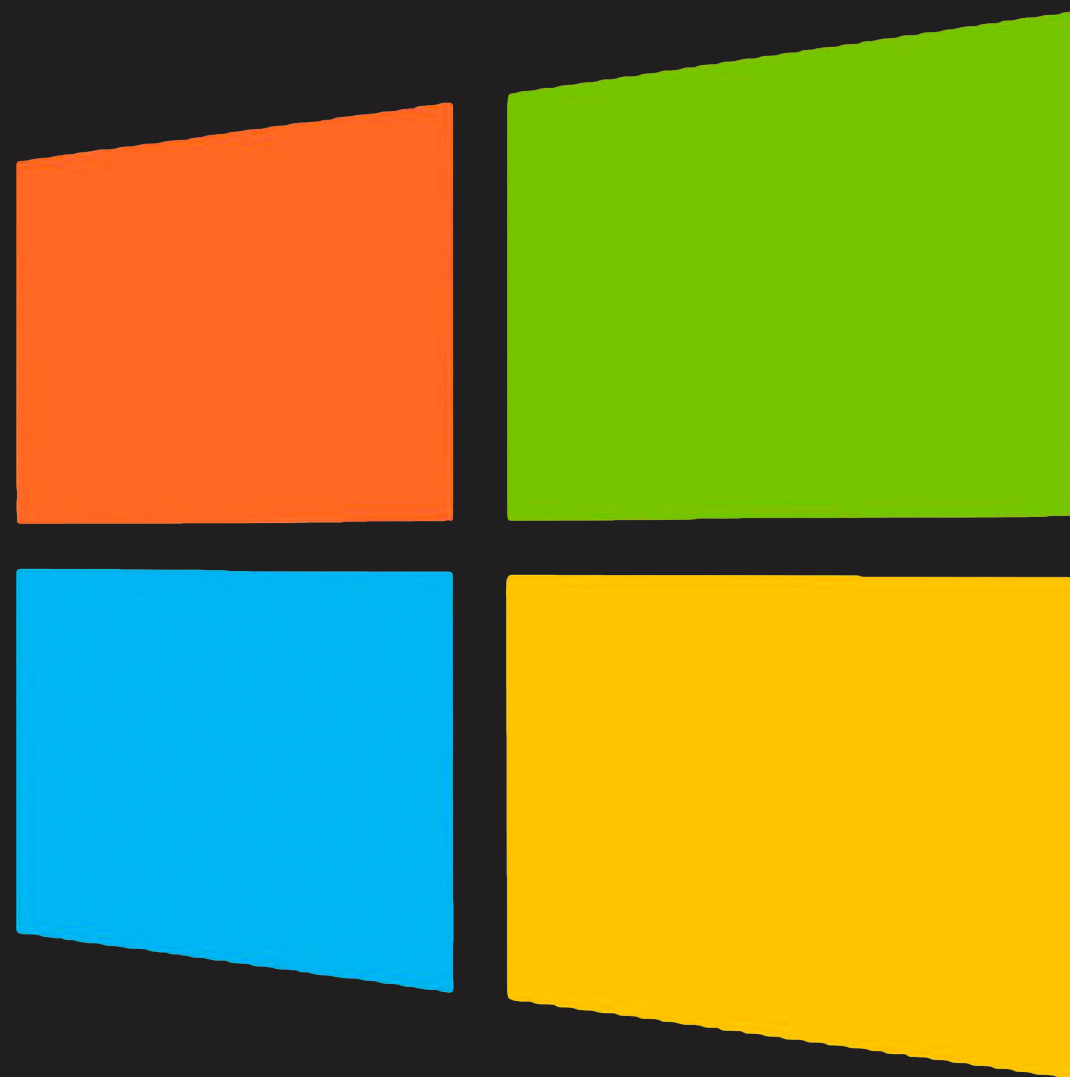
General Accounts: Microsoft

Account Security

Utilize Microsoft's security features to protect your account while allowing access to your legacy contact.

Add Legacy Contact

Follow Microsoft's process to designate and inform a legacy contact for your account.



Email Accounts: Apple (iCloud Mail)

Legacy Contact Setup

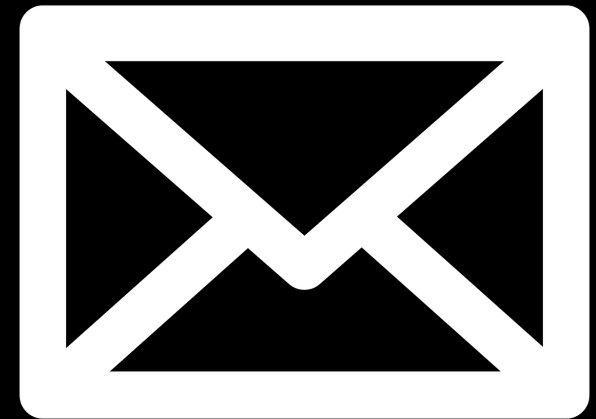
Set up a legacy contact for your iCloud Mail account to manage your data posthumously.

Share Access Keys

Securely share access keys with your legacy contact for iCloud Mail management.

Review Account Settings

Regularly review and update your iCloud Mail account settings for easier posthumous management.



General Accounts: Apple ID

Legacy Contact Setup

Add a legacy contact to your Apple ID to ensure your data is managed according to your wishes.

Share Access Key

Securely share the access key required by your legacy contact to manage your Apple account.

Manage Apple Data

Guide your legacy contact on handling your Apple data, including photos, emails, and personal information.





YAHOO!

Email Accounts: Yahoo

Manage Account Security

Ensure the security of your Yahoo account by keeping information current.

Executor Communication

Communicate effectively with your executor about managing your Yahoo account.

Social Media Accounts: Facebook

1 Memorialization Settings

Set up Facebook's memorialization settings to manage your profile after you pass away.

2 Choose Legacy Contact

Select a trusted person to manage your Facebook account and inform them of their responsibilities.

3 Manage Your Legacy

Understand the options and tools available to handle your Facebook profile posthumously.



Social Media Accounts: LinkedIn



Name Legacy Contact

Designate a legacy contact to manage your LinkedIn profile and professional presence.



Professional Legacy

Ensure your professional achievements and network are preserved and managed according to your wishes.



Account Settings

Configure your LinkedIn account settings to facilitate legacy management.



Social Media Accounts: Instagram

1

Memorialization Settings

Set up Instagram's memorialization settings to preserve your profile as a memorial.

2

Inform Legacy Contact

Notify and guide your chosen legacy contact about managing your Instagram account.

3

Review Privacy Settings

Ensure your privacy settings align with your wishes for posthumous account management.



Social Media Accounts: Twitter



1

Plan Without Legacy Feature

Create a plan for managing your Twitter account posthumously, despite the lack of a dedicated legacy contact feature.

2

Secure Login Sharing

Learn best practices for securely sharing your Twitter login details with a trusted person.

3

Document Your Wishes

Clearly outline your preferences for your Twitter account's future management.

E-commerce Accounts: Amazon

Communicate Wishes

Clearly communicate your Amazon account management wishes to a trusted person.

Share Login Credentials

Ensure your Amazon login credentials are shared securely with your designated contact.

Review Account Settings

Regularly review and update your Amazon account settings for easier posthumous management.





E-commerce Accounts: eBay

Update Personal Information

Regularly update your eBay account information to ensure accuracy.

Inform Executor

Provide your executor with all necessary details and instructions for managing your eBay account.



E-commerce Accounts: PayPal



1

Set Up Account Preferences

Customize your PayPal account settings for smooth management by your legacy contact.

2

Notify Executor

Inform your executor about your PayPal account and provide necessary access information.

3

Review Security Settings

Regularly review and update your PayPal security settings for posthumous access.



E-commerce Accounts: Etsy

Etsy

1

Ensure Information Accuracy

Maintain current and accurate information on your Etsy account.

2

Trusted Person Access

Provide a trusted individual with access to manage your Etsy account.

3

Document Account Details

Create a detailed document with your Etsy account information for your executor.

E-commerce Accounts: Shopify

Add Staff Account

Assign a trusted person as a staff member with permissions to manage your Shopify store.

Executor Instructions

Clearly outline the steps and permissions required for your executor to manage your Shopify account.

Review Store Settings

Regularly review and update your Shopify store settings for easier posthumous management.



Banking Accounts: General Steps



1

Compile Account Information

Create a detailed list of all your banking accounts, including login information and account numbers.

2

Draft Digital Estate Plan

Create a comprehensive digital estate plan outlining your wishes for managing your bank accounts.

3

Secure Document Storage

Store all relevant documents securely to ensure they are accessible to your executor.



Banking Accounts: Chase Bank

Power of Attorney

Set up a power of attorney to allow someone to manage your Chase account on your behalf.

Executor Instructions

Provide clear instructions to your executor on how to access and manage your Chase account.



CHASE

Banking Accounts: Bank of America

1 Manage Account Access

Ensure proper management of your Bank of America accounts by setting up necessary permissions.

2 Communicate with Executor

Effectively communicate with your executor about your Bank of America account details and instructions.

3 Review Account Settings

Regularly review and update your Bank of America account settings for easier posthumous management.

Bank of America





Banking Accounts: Wells Fargo



WF

Set Up Power of Attorney

Establish a power of attorney for your Wells Fargo account to facilitate its management.

Secure Document Storage

Store all relevant documents securely to ensure they are accessible to your executor.

Executor Communication

Clearly communicate your Wells Fargo account details and wishes to your executor.



Banking Accounts: CitiBank



1

Set Up Power of Attorney

Establish a power of attorney for your CitiBank accounts.

2

Communicate with Executor

Inform your executor about the power of attorney and CitiBank account details.

3

Review Account Settings

Regularly update your CitiBank account settings for easier posthumous management.



Banking Accounts: Online-Only Banks



Digital Management

Effectively manage your online-only bank accounts through digital platforms.



Secure Access

Ensure secure access methods are in place for your executor.



Document Details

Create detailed documentation of your online-only bank accounts for your executor.



Investment Accounts: General Steps



1

Create Detailed List

Compile a detailed list of all your investment accounts, including login information and account numbers.

2

Inform Executor

Ensure your executor is fully informed about your investment accounts and their management.

3

Review Beneficiaries

Regularly review and update beneficiaries for all your investment accounts.

Investment Accounts: Charles Schwab



charles
SCHWAB

Transfer on Death Designation

Set up a TOD designation to transfer your Charles Schwab account without probate.

Beneficiary Management

Regularly review and update beneficiaries for your Charles Schwab accounts.

Executor Instructions

Provide clear instructions to your executor regarding your Charles Schwab accounts.



Investment Accounts: Fidelity

Beneficiary Management

Add and manage beneficiaries for your Fidelity accounts to ensure smooth transfer.



Communicate with Beneficiaries

Inform your beneficiaries about their roles and responsibilities regarding your Fidelity accounts.

Investment Accounts: Vanguard

1 TOD Registration

Register your Vanguard accounts with TOD to bypass probate and simplify asset transfer.

2 Beneficiary Notification

Notify your beneficiaries about their designation and provide necessary information.

3 Account Review

Regularly review your Vanguard account settings and beneficiary designations.

The Vanguard logo is displayed in a bold, red, serif font. The word "Vanguard" is written in a classic, slightly italicized style, with a registered trademark symbol (®) at the end.



Investment Accounts: E*TRADE

1

Set Up TOD Designation

Set up a TOD designation for your E*TRADE account to streamline asset transfer.

2

Inform Beneficiaries

Notify your beneficiaries about their designation on your E*TRADE account.

3

Review Account Settings

Regularly review and update your E*TRADE account settings for easier posthumous management.

Investment Accounts: Robinhood

Manage Without TOD

Learn how to manage your Robinhood account without a TOD designation.

Create a Will

Include your Robinhood account in your will to ensure it is managed according to your wishes.

Executor Instructions

Provide clear instructions to your executor regarding your Robinhood account.

