

Five steps. This is the list somebody else would have to find, so it holds **what exists and where it lives, and never a password**. A list of where your accounts are helps the right person. A list of how to get into them helps anybody who picks it up. Check off each step you clear for a ticket.

WHOSE LIST THIS IS

WHO KNOWS IT EXISTS, AND WHERE IT'S KEPT

LAST UPDATED

#	THE STEP	WHAT GOES ON THE LIST	DONE ON	CLEAR
1	THE ONES THAT GET YOU INTO THE REST Do these first	Main email, phone carrier, password manager, the phone itself Resets go to an inbox and codes go to a phone number, so these sit above everything else	_____ DATE	☐
2	MONEY GOING OUT Charges that don't stop on their own	Streaming, standing grocery orders, utilities, insurance, loans, memberships A repeat order nobody knows about keeps arriving, every month, forever	_____ DATE	☐
3	MONEY SITTING SOMEWHERE However small	Bank, cards, payment app balances, brokerage, HSA, store credit A balance in a payment app shows up on no statement anyone is watching	_____ DATE	☐
4	SWITCH ON WHAT'S BUILT IN Free, and takes minutes	Google, Apple and Facebook each have their own version. See the box below You set them up now, so nobody has to argue with a support queue later	_____ DATE	☐
5	SAY WHERE THIS LIVES Out loud, to a person	Write it at the top, then tell whoever would need it A sheet nobody can find does nothing at all	_____ DATE	☐

THE ACCOUNTS

NO PASSWORDS Not here, not on the back, not anywhere on this sheet

WHAT IT IS	WHO IT'S WITH	WHERE TO FIND IT App, inbox, statement	WHICH CARD PAYS IT "The blue Visa", not digits	STILL Open?

THE THREE THAT ALREADY BUILT THIS, AND WHAT EACH ONE CALLS IT

Google Inactive Account Manager
Notifies people, and can share parts of your data, after a wait you choose. Up to 10 people.

Apple Legacy Contact
More than one allowed. They don't need an Apple device, and they'll need your access key plus a death certificate.

Facebook Legacy contact
Exactly one, and it has to be a Facebook friend. Can pin a post and request removal. Can't log in or read messages.

STEPS CLEARED — / 5

One ticket per step you clear, so five tickets for finishing the sheet. A step where the honest answer was **none** still counts, because now you know.

PUT IT WHERE YOU'D PUT THE PASSPORT

A safe, a lockbox, or with the one person who'd need it. This sheet is worth reading to a stranger, so it belongs with the documents, not on the fridge.

REDO IT ONCE A YEAR

Pick a date you already keep, like a renewal or a birthday. A list from four years ago sends someone to three accounts you closed and misses the six you opened.