

# Care Access Checklist for Your *Digital Executor*

(Who should have access to what)

## 1. Emergency Contacts

- Trusted family member knows location of passwords or password manager
- Caretaker has access to phone passcode (or backup unlock method)

## 2. Financial & Legal

- Executor or financial advisor has access to:
  - Online banking and bill pay accounts
  - Investment, insurance, and pension portals
  - Estate documents or trust folder

## 3. Health & Medical

- Caregiver or family contact can access:
  - Patient portals (MyChart, etc.)
  - Prescription refills
  - Health insurance accounts

## 4. Devices & Cloud

- Someone has access to:
  - Phone, tablet, and computer login codes
  - Cloud storage (Google Drive, iCloud, Dropbox)

## 5. Communication & Social

- Family contact can manage:
  - Email and voicemail
  - Social media or messaging apps (optional)

## 6. Utilities & Subscriptions

- Executor can view or cancel:
  - Internet, phone, TV, streaming, memberships

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