

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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