

Making Your Tech Plan

Making a tech plan for you and your family is one of the most important planning tools you can do in today's modern age.



All your bank statements, credit cards, photos, Email and much more are protected by passwords or passkeys

Make an **INVENTORY**

Make an organized list which includes:

- 1) Company Name
- 2) Which Email is associated with the account
- 3) Does it use a password or a passkey?
- 4) Do you want to include a family member on this account?



If you use a password bank, what extra information should be shared?

Make your **PLAN**

Your plan should include a directive and an action point

- 1) Assign a directive so that family members know how to manage the account. Should this be an account that needs to be deleted? memorialized? Does it have a \$ balance that needs to be transferred?
- 2) How will they be able to manage the account? What is the access required?