

Secure Communications

Passwords & Accounts

- Facebook
- FB Messenger
- Instagram
- Whatsapp
- Snapchat
- Your Ipad
- Shared Browsers with your log-in
- Your Old Phone(s) or other Devices

Social Media Settings

- Two Step Verification update
- Your Friends List
- Public “tagging” settings

New Google Account

- Gmail
- Google Docs for Notes & Lists
- Google Drive for PDFs and Images
- Google Spreadsheets to make lists

Legal Documents

- Will
- Healthcare Directive
- Prenuptial Agreement

Financial Information

- Bank Account Information
- Credit Card Balances
- 401(k) – IRA – Other Retirement Accounts
- Mortgage Statement
- Vehicle Statements

Household Possessions

Gifts (and who they are from)

- _____
- _____
- _____
- _____

Shared Items (and their estimated value)

- _____
- _____
- _____
- _____

Ready to Take the Next Step? Contact Our Offices at 310-275-4444

