



WHAT MY LOVED ONES NEED TO KNOW ONLINE ACCOUNTS

A financial planning guide for
after you're gone

GWS&A

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Client Name: _____

MY ONLINE ACCOUNTS, MEMBERSHIPS, AND SOCIAL NETWORKING

Password Manager: Using browsers and apps to safely store your passwords.

Need help remembering all your passwords?

Get a password manager, or save them to your browser.

We're often told that the passwords for our online accounts should be really strong, and to not use the same password anywhere else. Especially for those important accounts like email, banking, shopping and social media.

The trouble is, most of us have lots of online accounts, so creating different passwords for all of them (and remembering them) is hard.

This is where a password manager can help. A password manager can store all your passwords securely, so you don't have to worry about remembering them. This allows you to use unique, strong passwords for all your important accounts (rather than using the same password for all of them, which you should never do).

In addition, many password managers are helpful because they can:

- Synchronise your passwords across your different devices, making it easier to log on, wherever you are, and whatever you're using.
- Help spot fake websites, which will protect you from phishing attacks.
- Let you know if you're re-using the same password across different accounts.
- Notify you if your password appears within a known data breach so you know if you need to change it.
- Work across platforms, so you could (for example) use a single password manager that would work for your iPhone and your Windows desktop.

MY ONLINE ACCOUNTS, MEMBERSHIPS, AND SOCIAL NETWORKING

My Email Accounts

Email Accounts

For each email account, enter your username and password for online account access, along with the email provider's website address that you use to access your account. Also, be sure to include your email address.

Email Address 1: _____

Email Address 2: _____

Name of Email Provider: _____

Name of Email Provider: _____

Website Address: _____

Website Address: _____

Username: _____

Username: _____

Password: _____

Password: _____

Email Address 3: _____

Email Address 4: _____

Name of Email Provider: _____

Name of Email Provider: _____

Website Address: _____

Website Address: _____

Username: _____

Username: _____

Password: _____

Password: _____

MY ONLINE ACCOUNTS, MEMBERSHIPS, AND SOCIAL NETWORKING

My Travel Memberships

Travel Membership Accounts

For each airline, hotel, or other travel account, enter your username and password for online account access, along with the website address that you use to access your account. Also, be sure to enter any membership or ID numbers.

Travel Account Name 1: _____

Website Address: _____

Username: _____

Password: _____

Membership Number: _____

Notes: _____

Annual Membership: Yes No

Cost: \$ _____

Travel Account Name 2: _____

Website Address: _____

Username: _____

Password: _____

Membership Number: _____

Notes: _____

Annual Membership: Yes No

Cost: \$ _____

Travel Account Name 3: _____

Website Address: _____

Username: _____

Password: _____

Membership Number: _____

Notes: _____

Annual Membership: Yes No

Cost: \$ _____

Travel Account Name 4: _____

Website Address: _____

Username: _____

Password: _____

Membership Number: _____

Notes: _____

Annual Membership: Yes No

Cost: \$ _____

My Travel Memberships (Continued)

Travel Account Name 5: _____

Website Address: _____

Username: _____

Password: _____

Membership Number: _____

Notes: _____

Annual Membership: Yes No

Cost: \$ _____

Travel Account Name 6: _____

Website Address: _____

Username: _____

Password: _____

Membership Number: _____

Notes: _____

Annual Membership: Yes No

Cost: \$ _____

Travel Account Name 7: _____

Website Address: _____

Username: _____

Password: _____

Membership Number: _____

Notes: _____

Annual Membership: Yes No

Cost: \$ _____

Travel Account Name 8: _____

Website Address: _____

Username: _____

Password: _____

Membership Number: _____

Notes: _____

Annual Membership: Yes No

Cost: \$ _____

MY ONLINE ACCOUNTS, MEMBERSHIPS, AND SOCIAL NETWORKING

My Social Networking and Other Key Websites

My Social Networking Information

For each social network you use, enter your username and password.

Social Network: _____

Username: _____

Password: _____

Social Network: _____

Username: _____

Password: _____

Social Network: _____

Username: _____

Password: _____

Social Network: _____

Username: _____

Password: _____

My Other Key Website Information

For other key websites, enter your username and password. Remember to include any photo storage sites you use, as well as online payment sites, such as PayPal.

Website: _____

Username: _____

Password: _____

Website: _____

Username: _____

Password: _____

Website: _____

Username: _____

Password: _____

Website: _____

Username: _____

Password: _____

List any additional email or other online memberships in the Notes section of this guide.

Additional email or other online memberships listed in the Notes section of this guide? Yes No



NOTES

A series of horizontal lines for writing notes, starting below the 'NOTES' header and extending to the bottom of the page.

You've helped your family feel more comfortable about tomorrow.

By completing the planning guide, you're sharing your final wishes and providing loved ones with the information they need to make decisions. It's important to review this guide annually and update it as needed. Your GWS&A financial professional can help you with these updates and offer guidance in tandem with your other trusted advisors.

Important!

Please be sure to keep this highly personal and sensitive information in a safe and secure place. And let your family members, executor and attorney know where that place is. If you need assistance, feel free to contact your GWS&A financial professional at any time.

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