

Create A Family Password And Identity Plan — Worksheet

Customize for your family. Print, fill in, store safely.

Date completed: _____

Re-run this quarterly. Each pass takes about 12 minutes.

Per-child setup

<input type="checkbox"/>	Password manager family plan chosen 1Password / Bitwarden
<input type="checkbox"/>	Each adult has private vault + shared family vault _____
<input type="checkbox"/>	Shared accounts added to family vault Mortgage, utilities, insurance, etc
<input type="checkbox"/>	Identity document inventory complete SSNs, passports, birth certs locations
<input type="checkbox"/>	Emergency contacts documented Bank, attorney, doctor, executor
<input type="checkbox"/>	Emergency Access feature set up Designated contacts + wait time
<input type="checkbox"/>	Master access kit printed + stored Fireproof safe + attorney
<input type="checkbox"/>	Annual review date on calendar _____

Advanced — if you want to go further

<input type="checkbox"/>	Attorney holds executor instructions
<input type="checkbox"/>	YubiKey as recovery factor
<input type="checkbox"/>	Digital legacy plan across services
<input type="checkbox"/>	Family group email/phone for signups
<input type="checkbox"/>	Quarterly recovery drill
<input type="checkbox"/>	Adult children added as Emergency Access