

Checklist: 10 steps to get your family started with Trustworthy

Just getting started with Trustworthy? Using the Family Operating System® is a secure and easy way to organize and share important information with your trusted inner circle. Taking these steps will help you get the most out of your experience, so you'll feel relaxed and in control.

Step 1

Take advantage of your onboarding and concierge service

Every new Trustworthy plan comes with a minimum of 30 minutes of onboarding with your concierge. Members of the platinum plan also get three additional hours of 1:1 concierge service.

To get started:

- ☐ Gather important items from your purse and wallet
- ☐ Find your "important documents" folder
- ☐ Rustle up any other easy documents you can get started with

If you're also on the platinum plan, think about setting up time to work with the concierge to:

- ☐ Get a new will, trust, or other estate documents
- ☐ Set up life insurance or other policies
- ☐ Tackle emergency planning and preparation

Step 2

Download the free Trustworthy app for easy scanning and upload

Trustworthy has a [free mobile app for iOS devices](#), and downloading it will help you get the most out of your experience. Use this feature on mobile to scan information such as:

Family IDs

- ☐ Driver's license
- ☐ Social security cards
- ☐ Passports
- ☐ Birth certificates
- ☐ Marriage license
- ☐ Vaccine cards
- ☐ Medical insurance cards

Property

- ☐ Home insurance
- ☐ Mortgage documents
- ☐ Renter's insurance
- ☐ Car insurance
- ☐ Car title documents
- ☐ Car purchase documents

Step 3

Inventory your digital life

Chances are your digital life is spread out across many different platforms and services. This is the perfect time to take stock of what you have and where.

If you're also on the platinum plan, think about setting up time to work with the concierge to locate where your other family information is digitally stored. Here's a list of places to begin your search:

- ☐ OneDrive
- ☐ Google Drive
- ☐ Dropbox
- ☐ iCloud
- ☐ Notes App
- ☐ Other:

Reminders & notes:

Step 4

Add your digital accounts

Digital accounts include all your online accounts and passwords, including important items like savings accounts and insurance. Adding this information to your dashboard keeps your information secure, and ensures that your family is prepared in case of events like identity fraud.

Money

- ☐ Checking
- ☐ Savings
- ☐ 529 college savings
- ☐ 401(k) and retirement savings
- ☐ Brokerage accounts
- ☐ Stocks and bonds
- ☐ Digital and crypto assets

Passwords & password manager

- ☐ Social media accounts
- ☐ Smartphone-related accounts
- ☐ Photo storage
- ☐ Loyalty/reward programs
- ☐ Digital entertainment subscriptions
- ☐ Digital entertainment assets
- ☐ Healthcare portals

Insurance

- ☐ Term life insurance
- ☐ Medical insurance
- ☐ Homeowners insurance
- ☐ Umbrella insurance
- ☐ Auto insurance

Step 5

Get a password manager

If your family doesn't have a password manager yet, now is a good time to make it happen!

Select or research a [family password manager](#):

- ☐ 1Password
- ☐ LastPass
- ☐ Dashlane
- ☐ Bitwarden
- ☐ Keeper
- ☐ Other:

Step 6

Securely destroy select paper records

Once you no longer need these documents on paper, it's a good idea to invest in a shredder so that people can't rummage through your paper documents in the trash.

Note:

We recommend keeping hard copies of the following documents for a year, unless you need them for tax purposes (keep those for three years):

- Bank statements
- Credit card receipts
- Access control
- Paycheck stubs
- Utility bills
- Canceled checks

Step 7

Delete or cancel redundant information and accounts

Delete redundant information and close down digital accounts you aren't using after you've uploaded your information into Trustworthy, to increase your security and save space and money.

- ☐ Delete redundant information
- ☐ Cancel excess subscription fees
- ☐ Close digital accounts are no longer using

Step 8

Add collaborators to the platform

Decide who should be part of your trusted inner circle. Choose collaborators for specific sections as well.

- ☐ Family Members
- ☐ Close family friend(s)
- ☐ Estate planner
- ☐ Financial advisors

Step 9

Create custom reminders

Now that all your information is securely stored in Trustworthy's dashboard, this is the perfect opportunity to create custom reminders to stay on top of your life's important details.

Set reminders to:

- ☐ Renew your passport or driver's license
- ☐ Refinance your mortgage
- ☐ Change important account passwords
- ☐ Schedule biannual dentist appointments
- ☐ Other:

Step 10

Fill in the missing blanks

What's missing in your Family Operating System®? Review and make sure you're covered for long-term and short-term emergencies, or long-term milestones.

Congrats, you did it! 🎉

Organizing your family's information and planning for the future is a gift to everyone you care about. By getting your house in order, you can rest easy that your family is more than prepared for life's moments, both big and small.