Organizing Your FINANCES

IT'S A MONEY THING®

ONLINE PERSONAL INFORMATION MAP



If you were injured or incapacitated in any way, would your loved ones be able to quickly locate your important information or know how to handle your affairs? Even if the physical copies of your important documents are stored in a fireproof safe or in a safe-deposit box, it's smart to have digital records and instructions that can be accessed remotely by your emergency contacts.

Create an online spreadsheet with all of your important information

We've created an ***Online Personal Information Map*** template. It's a free 13-page Google Spreadsheet that you can share with your family and friends. The spreadsheet includes prompts for standard information, plus you can customize it for your needs. If you are not already a Google user, you will need to sign up for a free account.

Go to ***bit.ly/MoneyThingMap*** in your browser

1 Make it your own

Click File > Make a copy... to save it to your Google account. Be sure to set your version of the spreadsheet's sharing settings to private.

2 Fill in the blanks

Input your information as well as how to locate the original documents in these categories:

- Personal information
- Important contacts
- Important bills
- Health
- Emergency plan
- Location of backups, docs
- Insurance policies
- Bank accounts
- Investments
- Vehicles
- Real estate
- Other assets/ valuables
- Credit cards

See the sidebar to the right for strategies on recording and sharing your passwords.

3 Share your spreadsheet

Sharing a Google Spreadsheet is easy. Click on the Share button on the upper right and you can email permission to your emergency contacts. Be sure to specify whether they can edit, comment or simply view your spreadsheet.

4 Update regularly

You'll need to update your spreadsheet when you add accounts or make changes to your information. In addition, you should review your spreadsheet regularly—consider doing so at least yearly or, better yet, quarterly.

Set up a reminder on your calendar so you won't forget to update information. When you get your reminder, don't wait—just quickly look over the items in your spreadsheet and if anything has changed, update it.



PASSWORD SHARING STRATEGIES

Use a password manager app

Do not store individual passwords in your spreadsheet. Instead, use a password manager app on your smartphone and computer such as KeePass, LastPass or 1Password to securely record all of your online passwords.

Share hints, not passwords

Personally call your emergency contacts to give them the master password for your password manager app. For security reasons, ask them to only write down a hint that will be memorable to them, rather than the actual master password.

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