

# Email & Phone

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# Email Accounts

## Primary Email

|                      |                                                      |
|----------------------|------------------------------------------------------|
| <b>Email Address</b> | <i>[Primary email]</i>                               |
| <b>Provider</b>      | <i>[Gmail, Outlook, self-hosted, etc.]</i>           |
| <b>Password</b>      | <i>See password manager</i>                          |
| <b>2FA Required?</b> | <i>[Yes/No — see 2FA page]</i>                       |
| <b>Used For</b>      | <i>[e.g., Personal, bills, most account signups]</i> |

## Other Email Accounts

| <b>Email Address</b> | <b>Provider</b>   | <b>Purpose</b>                   | <b>Notes</b> |
|----------------------|-------------------|----------------------------------|--------------|
| <i>[Email 2]</i>     | <i>[Provider]</i> | <i>[Work, spam filter, etc.]</i> |              |
| <i>[Email 3]</i>     | <i>[Provider]</i> | <i>[Purpose]</i>                 |              |

## Email Forwarding / Aliases

*[Are any emails forwarded to each other? Do you use aliases or catch-all addresses? This matters for receiving password reset emails.]*

# What to Do With Email

Keep the primary email account active for as long as possible — many account recovery and notification emails go there. Don't delete it or let it lapse. If it's a Gmail/Outlook account, it will stay active indefinitely as long as you log in occasionally. If it's tied to a custom domain, see "Domain Names & DNS" in the Self-Hosted Services chapter.

# Phone & Cell Plan

## Steve's Phone

|                             |                                                                      |
|-----------------------------|----------------------------------------------------------------------|
| <b>Phone Number</b>         | <i>[Phone number]</i>                                                |
| <b>Carrier</b>              | <i>[e.g., Verizon, T-Mobile, AT&amp;T]</i>                           |
| <b>Account Holder</b>       | <i>[Name on the account]</i>                                         |
| <b>Account Number / PIN</b> | <i>[Account number and transfer PIN — or "see password manager"]</i> |
| <b>Plan Type</b>            | <i>[Individual / Family plan]</i>                                    |
| <b>Monthly Cost</b>         | <i>[Amount]</i>                                                      |
| <b>How It's Paid</b>        | <i>[Auto-pay from which card/account]</i>                            |
| <b>Device Payment?</b>      | <i>[Still paying off the phone? How much remains?]</i>               |

## Family Plan Members

*[If it's a family plan, list who else is on it and their numbers. They'll need to know if the account holder changes.]*

| <b>Name</b>   | <b>Phone Number</b> | <b>Notes</b> |
|---------------|---------------------|--------------|
| <i>[Name]</i> | <i>[Number]</i>     |              |
| <i>[Name]</i> | <i>[Number]</i>     |              |

# Why the Phone Number Matters

Steve's phone number is likely the recovery number for many accounts and receives 2FA text codes. **Do not cancel this line immediately.** Keep it active for at least several months while you transition accounts. Contact the carrier to transfer ownership of the account if needed.

## Porting / Transferring the Number

*[Steps to transfer the phone number to another person or device. You'll typically need: death certificate, account PIN, and to visit a store or call customer service.]*