

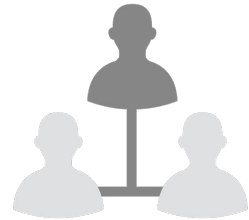
# The Step-by-Step Guide: Set Up Data Inheritance

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## The Step-by-Step Guide: Set Up Data Inheritance

With data inheritance, you can make sure that your partner and family are not denied access to important information such as login criteria, passwords and legal documents in the event of a fatal accident or emergency. You can activate this function directly within your SecureSafe.



### Overview: roles of Data Inheritance

To understand how Data Inheritance works, a quick look at the roles that need to be defined can be helpful.

- **Beneficiary/Beneficiaries:** A beneficiary is any person you would like to pass on data to in case you are involved in an emergency or fatal accident. You define your beneficiaries in your SecureSafe and assign the passwords and files you would like them to have if something happens to you.
- **Authorized Activator:** It is unlikely that you will be able to activate Data Inheritance by yourself should something happen to you. Therefore, you need to select one or more Authorized Activators. Choose someone that is close to you and whom you trust. Your Authorized Activator(s) will be in charge of activating Data Inheritance according to your wishes. They will need an Activator Code, which you can print from within your safe, to be able to activate Data Inheritance for you.

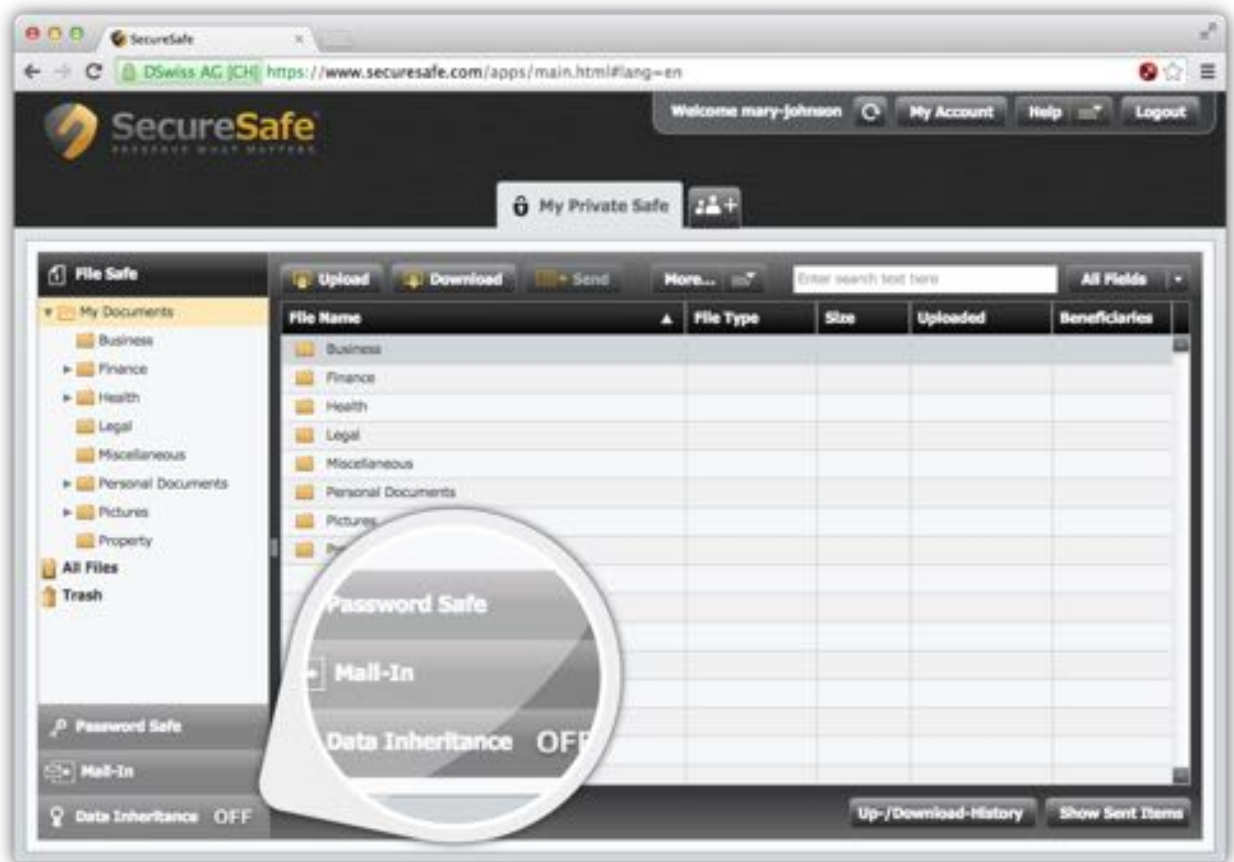
### Activate Data Inheritance

Would you like to activate the unique feature of Data Inheritance in your SecureSafe but aren't sure how? We'll walk you through the steps right here.

#### Step 1: Log in and check the Data Inheritance tab

1. First log in to your SecureSafe via any browser on your PC or Mac.
2. Once in your account, click the Data Inheritance tab, which you'll find in the lower left corner of your SecureSafe.

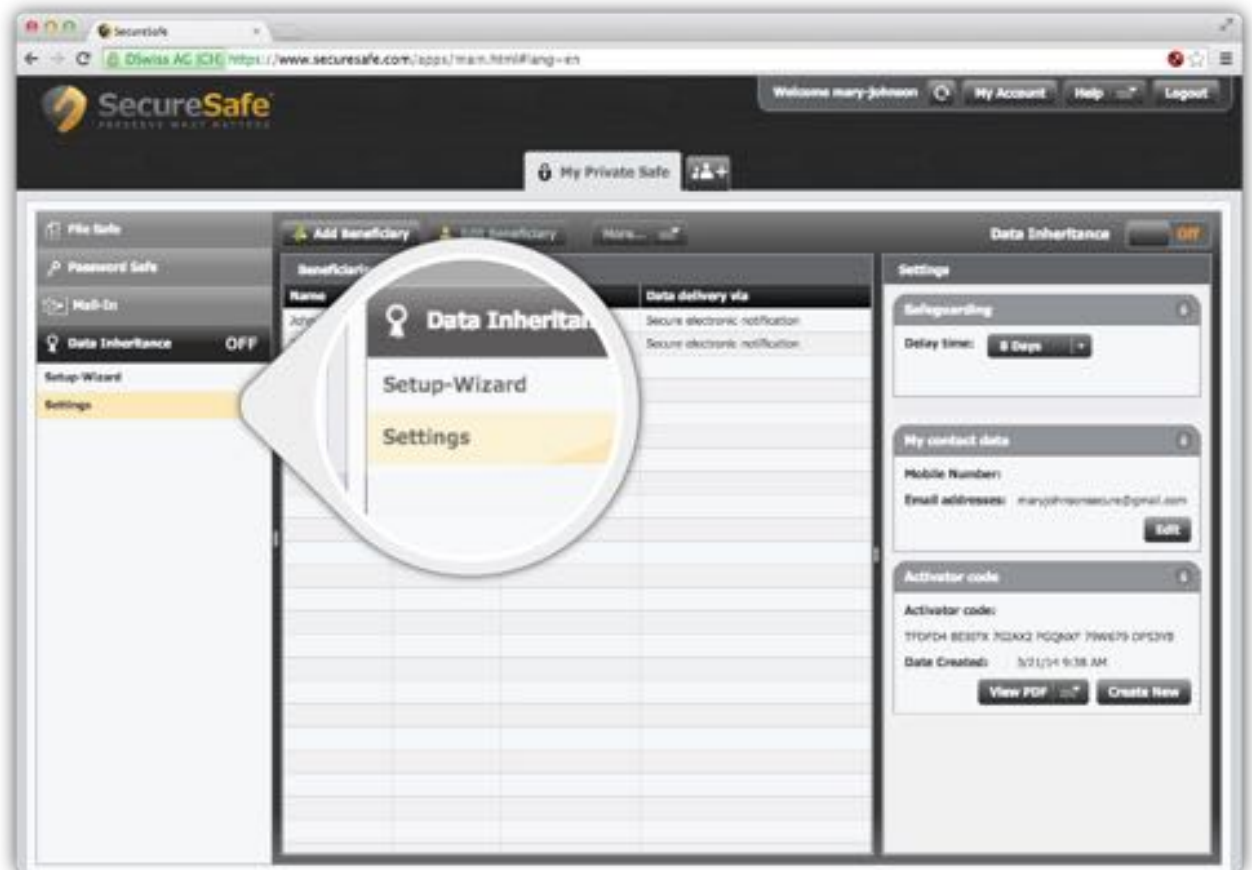
3. If Data Inheritance is not yet activated, this tab will be marked with the word "OFF". As long as this status indicator does not change to "ON", you haven't yet completed all the steps needed to activate Data Inheritance.



*Log in to your SecureSafe. So long as the Data Inheritance tab in the lower left corner is indicating that Data Inheritance is OFF, you haven't yet completed all the steps needed to activate Data Inheritance.*

## **Step 2: Choose your setup guide**

1. Click the Data Inheritance tab in the left side of your screen.
2. You now have two options: "Setup Wizard" and "Settings". Choose the "Setup Wizard" if you want to follow our built in guide to activating Data Inheritance. To follow this guide, choose "Settings" and keep reading.

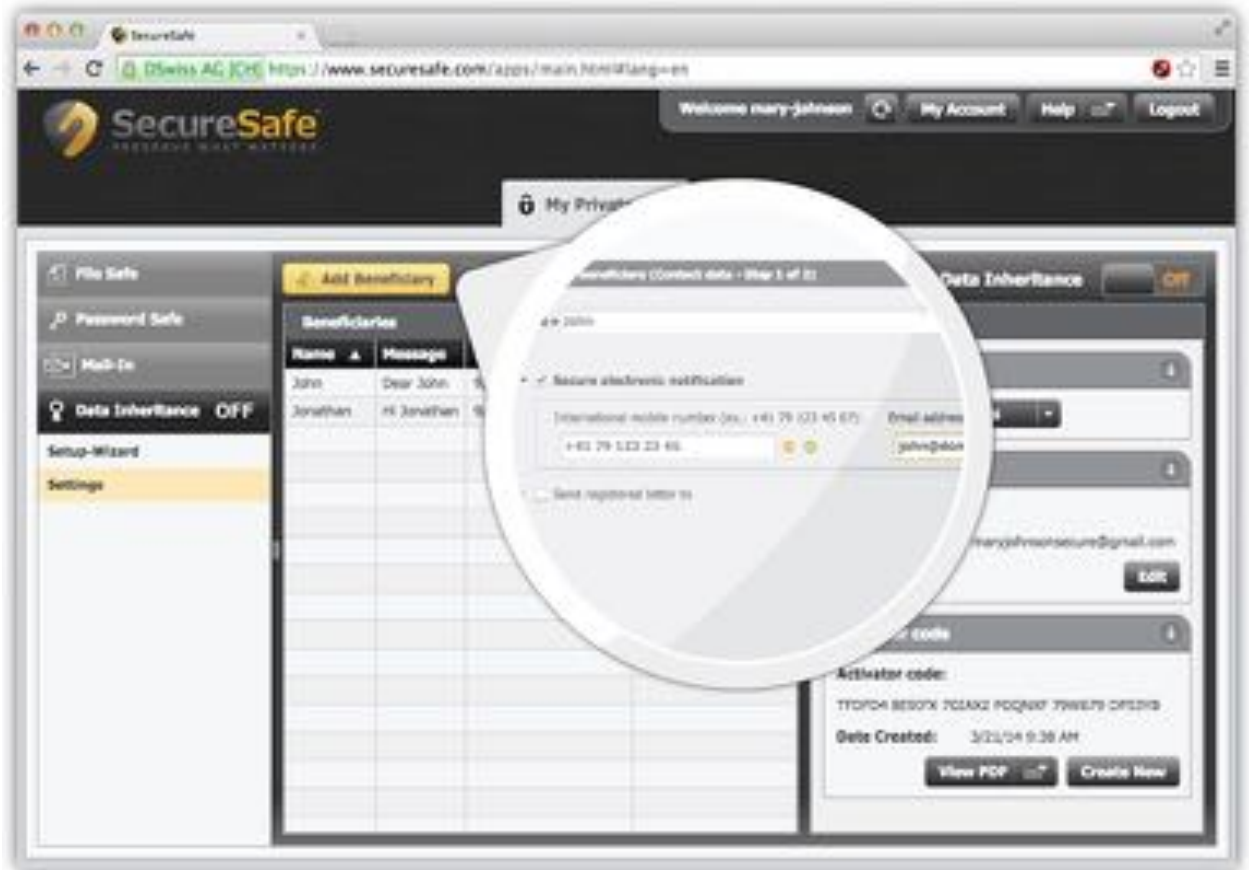


*Click on the Data Inheritance tab and choose between "Setup Wizard" and "Settings".*

### **Step 3: Define one or more beneficiaries**

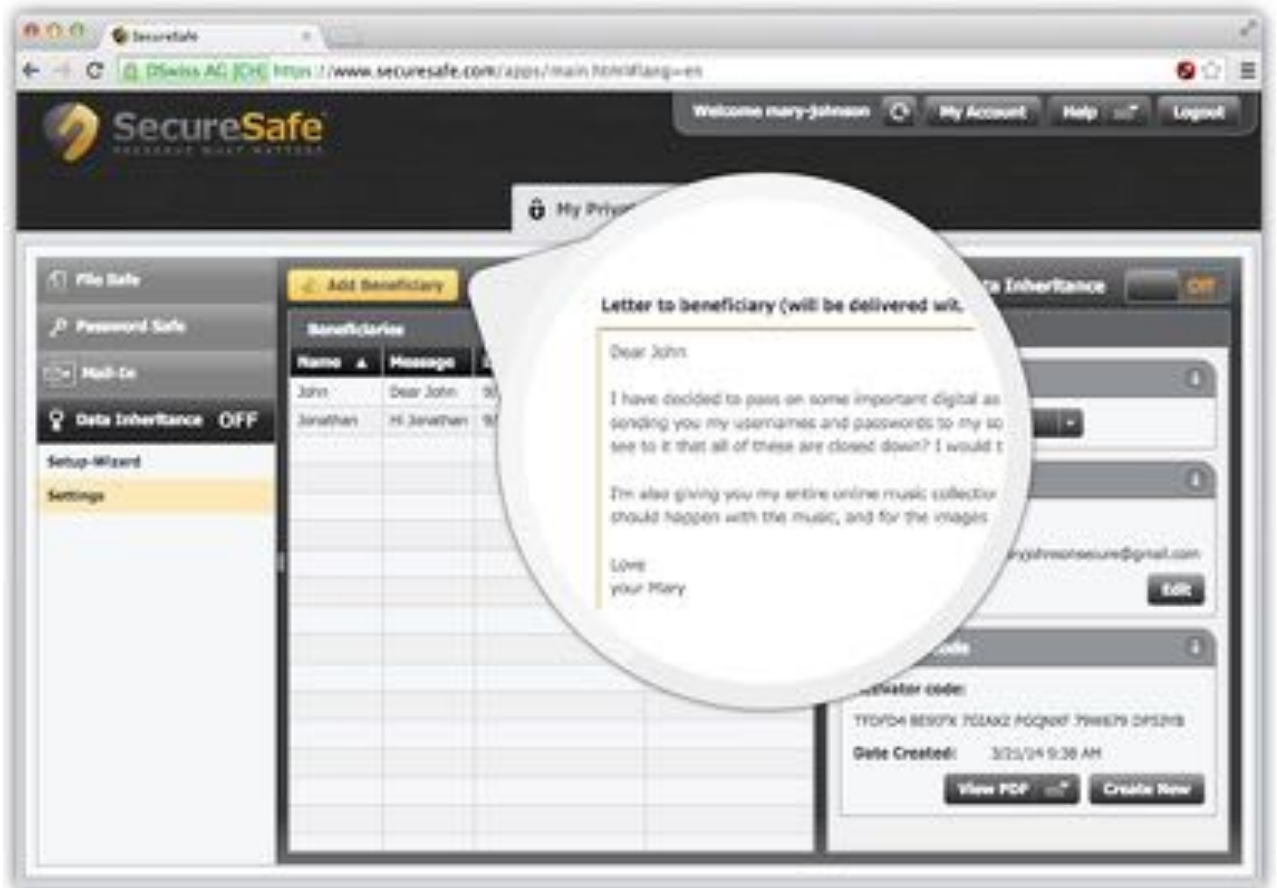
For Data Inheritance to work, you'll need to define one or more beneficiaries. A beneficiary is a person that you want to pass on important passwords or files to in case you are involved in an emergency or fatal accident. Beneficiaries are often family members, close friends or business partners, but it can be anyone you define as such.

1. To define a beneficiary, click the "Add Beneficiary"-button in the upper left corner of you SecureSafe.
2. Fill in the name, international phone number (include the country code) and email of your beneficiary in the window that pops up.
3. Double check that you have entered the correct information, then click "Next".



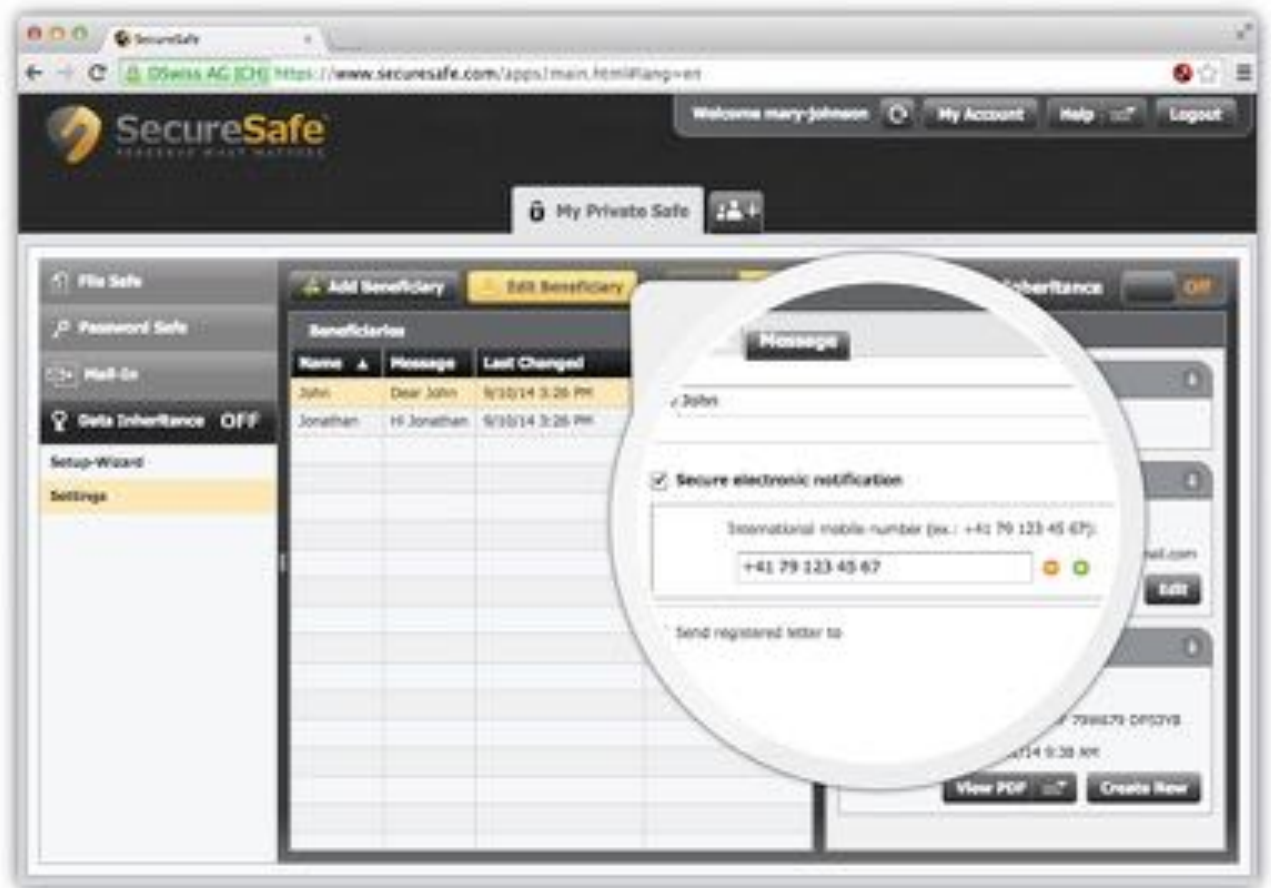
*Choose "Add Beneficiary" in the upper left corner of your SecureSafe and fill in the needed information to set up your beneficiary.*

4. A new window will appear giving you the option of writing a notification email to your beneficiary. This mail will only be sent, if the Data Inheritance is activated and carried out.
5. We recommend that you take this chance to write a personal message that will explain to your beneficiary that you've decided to pass on important data to him or her, what specific data you're passing on and how they can use it.



*Write a letter to the beneficiary with information about the inheritance. This will only be sent if the Data Inheritance is activated and after the safeguarding period has run out.*

6. Once you've written your message, click "Save".
7. Your newly created beneficiary will now appear in the list of beneficiaries in your SecureSafe. If you want to change any of the information connected to him/her, simply mark their name and click the "Edit Beneficiary" button.

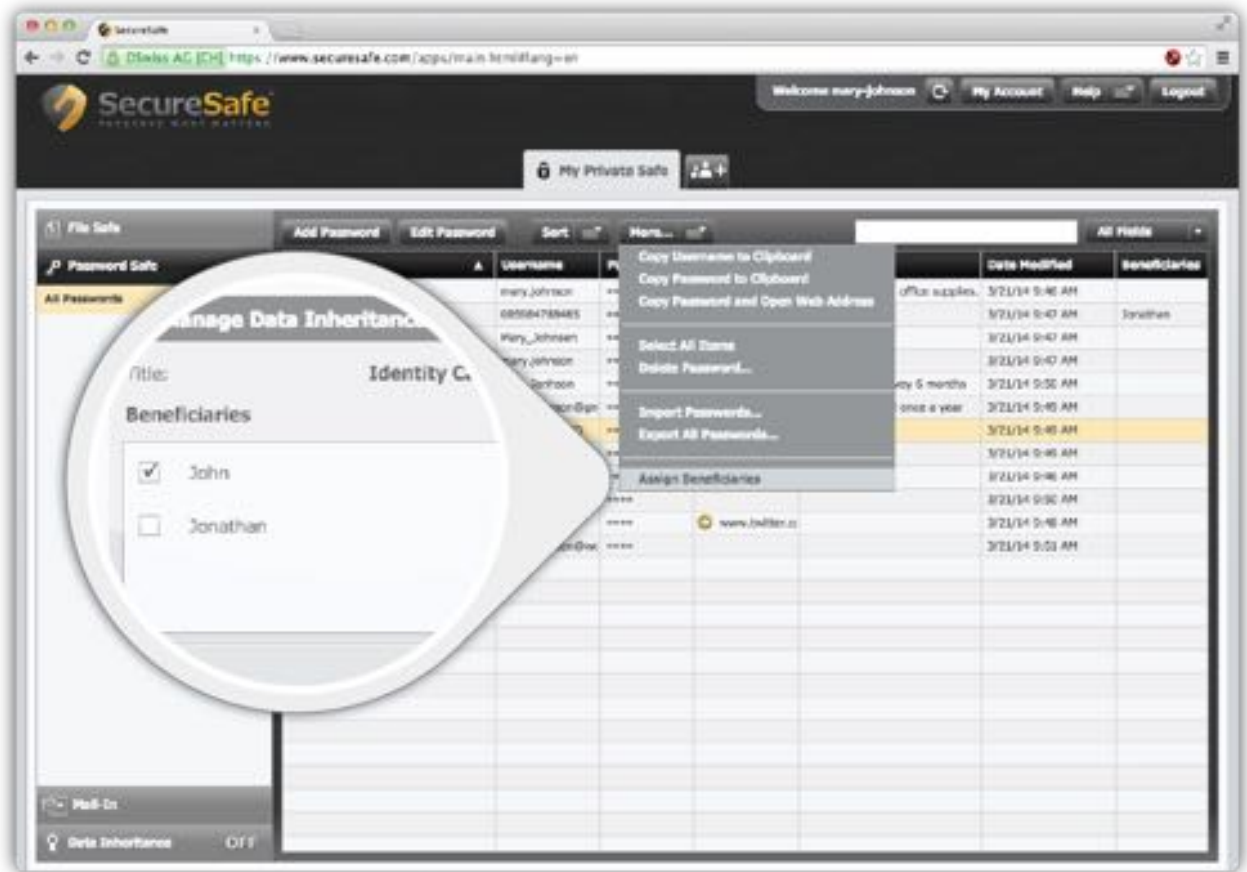


*Your beneficiary is now listed in your SecureSafe. Remember that we never contact your beneficiary, so it's a good idea to inform them of your choice to pass on data to them through SecureSafe in case of an emergency.*

#### **Step 4: Specify which passwords and files a beneficiary will inherit**

Now that you've defined a beneficiary, you'll need to specify which files and passwords, you want this person to inherit.

1. To assign passwords to your beneficiary, go to your Password Safe
2. Mark the passwords, you want to assign to a certain beneficiary.
3. Then click the "More" option in the menu bar and choose "Assign Beneficiary" from the drop down menu.
4. A window showing all your beneficiaries will pop up allowing you to choose the person you want to assign the chosen passwords too.
5. Simply mark the empty check box next to the name of the beneficiary, you want to choose and then click "Save".



*Choose the beneficiary you want to pass on the chosen data to from the following window.*

If you want to assign files to your beneficiary, go to your File Safe and follow the same steps as for assigning passwords.

1. Mark the files you want to assign.
2. Click "More" and choose "Assign Beneficiary" from the dropdown menu.
3. Once again, check off the beneficiary you want to pass on the files to and hit "Save".

You can assign as many passwords and files to a beneficiary as you would like and you're always free to edit your choices at a later point, if necessary.

Now that you have set up a beneficiary and assigned selected passwords and files to this person, you only need to go through two more steps to fully activate Data Inheritance.



## Step 5: Choose Authorized Activator(s) and give them the Activator Code

In case of an emergency or fatal accident, you're unlikely to be able to activate Data Inheritance yourself. Therefore, you need to choose one or more Authorized Activators, who will be responsible for doing this. To authenticate their status as Authorized Activators, you need to provide them with a so-called Activator Code that's been created from within your SecureSafe.

1. To find and print the Activator Code, go back to the Data Inheritance tab in the right side of your screen.
2. Click "View PDF" in the lower right corner of your safe to view and download a prewritten letter for your activator(s).



3. This letter includes the Activator Code and a step-by-step explanation on how to activate the Data Inheritance.
4. Note that you can choose the language you want the activation letter to be in in the dropdown menu right next to the "View PDF"-button. Choose a language that your Authorized Activator will be comfortable understanding.
5. Make sure the person(s) you chose as your Authorized Activator(s) receives this letter in a secure way. We advise that you do not send it as an email attachment as

this can be insecure. Instead we recommend that you hand it over in person, send it with Secure File Transfer or send it by regular mail.

6. Follow up with your Authorized Activator to check that he or she has understood the concept of Data Inheritance and that he/she understands what he/she needs to do in case you're involved in an emergency or fatal accident.



**IMPORTANT – CONFIDENTIAL**  
**SecureSafe Activator-Code**

 **SecureSafe**  
PRESERVE WHAT MATTERS.

**FROM:** SecureSafe Customer: \_\_\_\_\_

**TO:** Authorized Activator: \_\_\_\_\_

SecureSafe is a highly secure Swiss data-safe with a data inheritance service. As a SecureSafe customer, I appoint you as my authorized Activator with the task of activating the "data inheritance" of my important data, as arranged by me with SecureSafe, in the following particular circumstances:

- in the event of my passing
- according to my oral instructions
- \_\_\_\_\_

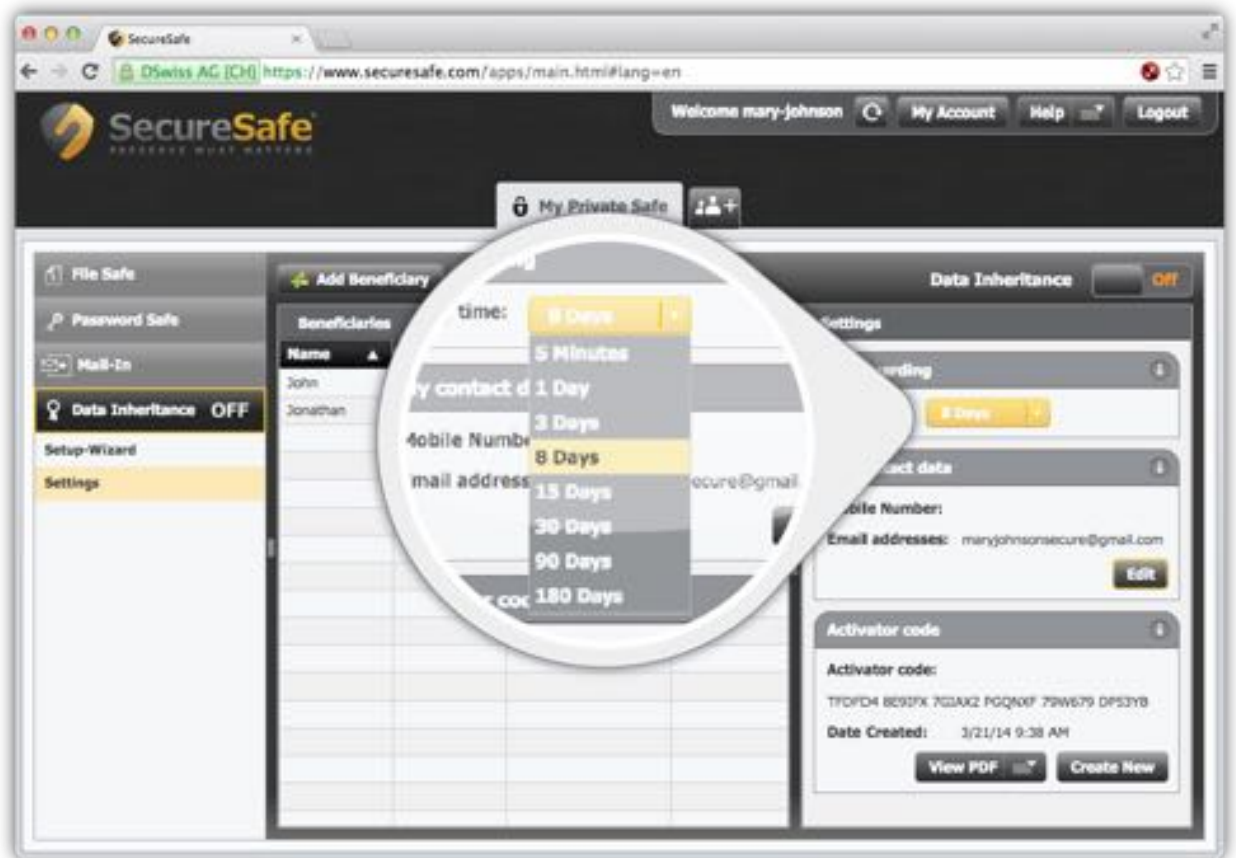
This is a responsible and very important task. In doing this, I would ask you to observe the following:

**WHAT NEEDS TO BE DONE?**  
To activate data inheritance of my essential data, please enter the following activation code at this internet address:  
[www.securesafe.com/activate](http://www.securesafe.com/activate)

T3D6C2	36EZKJ	USVLXV	3AGQFFV	4S/W57	A3K57E
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### Step 6: Choose a safeguarding delay

The safeguarding delay is a period of time from an Authorized Activator activates Data Inheritance until it is carried out. In this time frame SecureSafe will contact you via email and SMS to let you know that Data Inheritance for your safe will soon be completed. We do this as a precautionary step in the unlikely event that one of your Authorized Activators should activate the process against your will. If you act before the safeguarding period runs out, you can simply logging in to your SecureSafe, as you would do it normally, and stop the Data Inheritance from taking place.

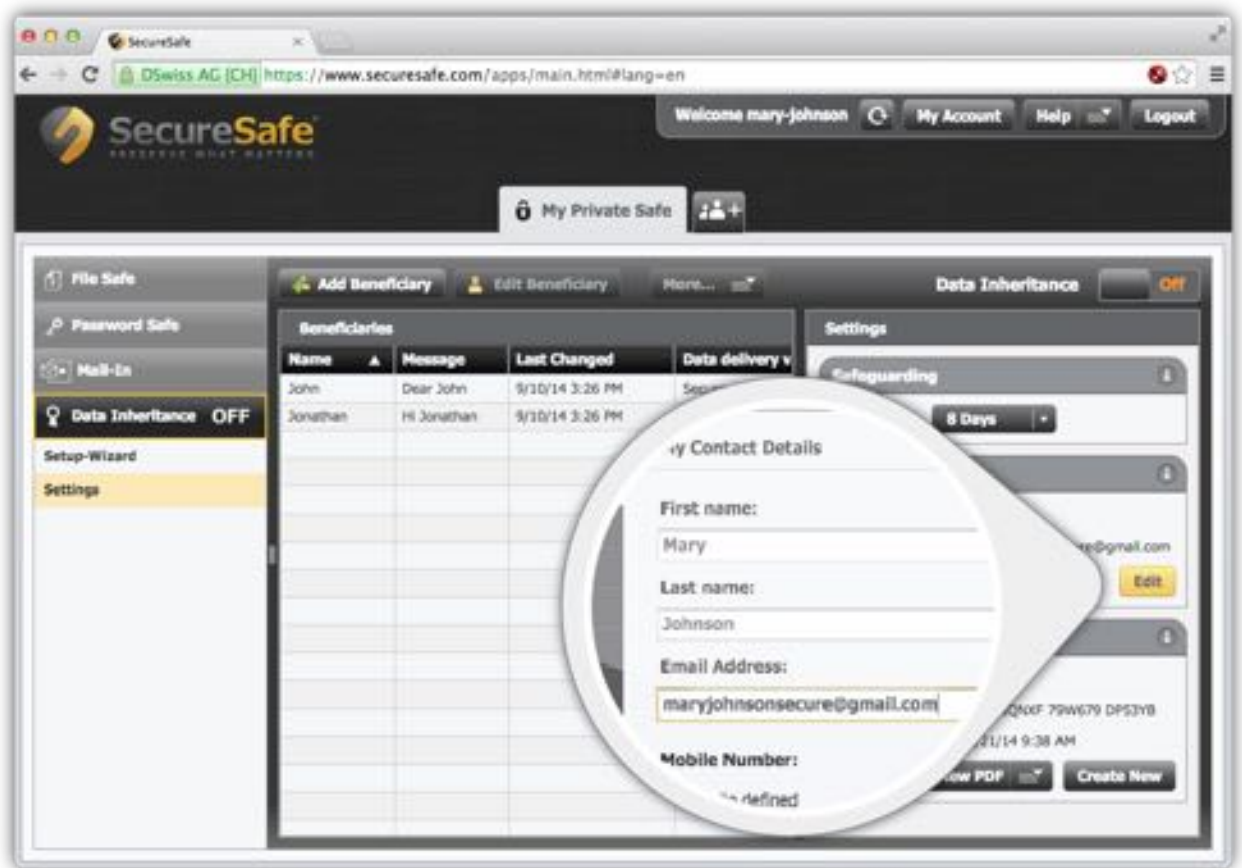


*The safeguarding delay is set to 8 days per default. If you want to change it simply click the safeguarding drop down menu and choose another period.*

### **Step 7: Fill out your current contact information**

We need your current contact information when you activate Data Inheritance because we need to be able to contact you in case the Data Inheritance is activated (as explained above).

1. To update your current contact information, go to the Data Inheritance tab in the right side of your screen.
2. Click the "Edit" button under the field "My contact data".

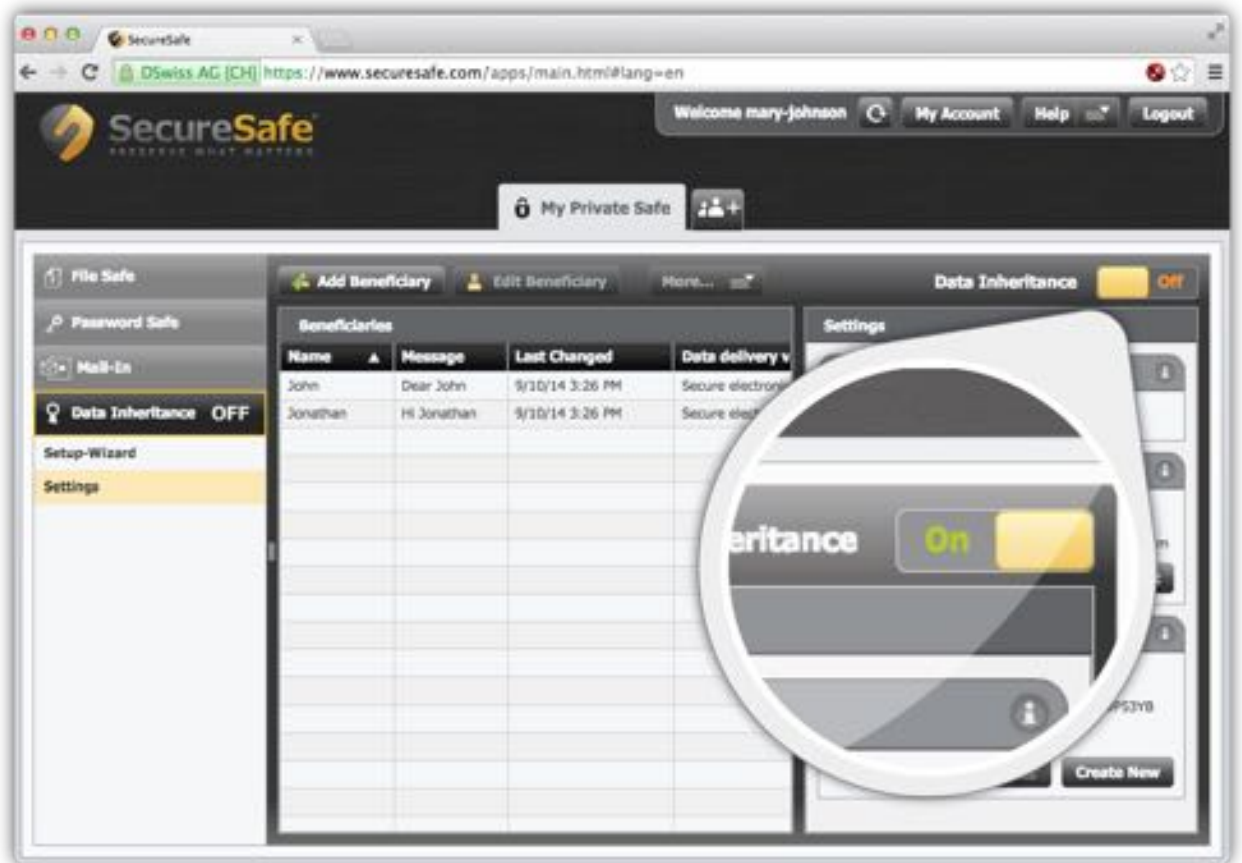


*Note: It's important that you update your contact information whenever changes occur.*

3. Fill in your current contact information.
4. Double check that the information is correct click "Save and close".

### **Step 8: Finalizing the activation of Data Inheritance**

1. To finalize the activation of your Data Inheritance slide the ON/OFF button from OFF to ON. You'll find the button in the upper right hand corner of the Data Inheritance tab.
2. Once it's set to "ON", your Data Inheritance is up and running.



*To finalize the activation of your Data Inheritance slide the ON/OFF button from OFF to ON.*

Have more questions? Please visit our FAQs to learn more about Data Inheritance. Simply go to [www.securesafe.com/en/faq/inheritance](http://www.securesafe.com/en/faq/inheritance)