

HEIRLOOM TRUSTEESHIP POLICY

(updated on 6/30/25)

Each Heirloom Member can appoint a desired number of Trustees to their Heirloom account. (A recommended practice is to appoint no fewer than two (2) and no more than five (5) Trustees.) The Trustees function as custodians of the Member's Heirloom account once this Member passes away. The Trustees get activated in a thorough verification process to ascertain that the Member's data go to the right hands and stay private and secure.

How to set up a Trustee:

The Heirloom user initiates the process by sending an email ***Invitation to Serve as a Trustee*** to a person they desire to be their Trustee. From that point, we treat this person as a "Trustee-Designate". The Trustee-Designate reviews the terms of trusteeship (this Heirloom Trusteeship Policy), and based on that they decide whether to ***accept or reject the role of a Trustee***. Once accepted, the Trustee-Designate becomes ***an official Trustee***. Their Heirloom account is automatically interconnected with the user's account and an option to claim trusteeship is added to their Heirloom account. If the Trustee-Designate does not have an Heirloom account, they are invited to set up a (free) account.

The Trustee can assume their actual role only after the death of the Heirloom user. In order to ***claim trusteeship***, the Trustee will need to provide Heirloom with ***an official proof of the Heirloom user's death***.

For every confirmed Trustee Heirloom generates a unique **Trustee Activation Code**. This code (in the form of a uniquely generated code or a QR code) can be used in case that the Trustee hasn't set up their Heirloom account at the occasion of being invited as a Trustee, lost access to this account, or have any other issue with claiming their trusteeship upon the Heirloom user's death.

Trustee's rights and obligations:

Trustee should act in the best interest of the Heirloom Member who appointed them to this role. To this end, the Member can leave detailed instructions in their Docuvault where the Member outlines how they wish their Legacy Room to be operated after they pass away.

Per Heirloom Trusteeship policy, **a Trustee is granted a right to:**

- access all content in the Legacy Room (view-only)
- edit the Family Tree (i.e. add new family members or correct relationships based on new evidence)
- administer the Guest Book, which is started upon the Member's death
- change the terms of payments/subscription
- add another Trustee(s) to secure continuity of the entrusted legacy

It should also be spelled out that **a Trustee is not allowed to:**

- erase the Member's account or any of its content

Payment after the Member's death:

Each Heirloom Member should plan carefully for what will happen with their Legacy Room after they pass away. The Trustee, or a group of Trustees, may assume the payment responsibility after the Member's death, but it is not by any means their obligation. A third-party sponsor can step in. The Heirloom Member might also consider to pay the Perpetuity Fee in the amount of \$999, which guarantees them to keep their legacy accessible and alive without any further dues in the future.