
FREE RESOURCE

Digital Estate Checklist

Your digital life is an extension of your estate. Without a plan, your photos, accounts, and memories can be lost forever. This checklist helps you organize them before it matters.

Work through each section, check items off as you complete them, and store this checklist with your other estate planning documents.

Account inventory

- [] Banking and investment accounts
- [] Retirement accounts and pensions
- [] Credit cards and loans
- [] Email accounts
- [] Social media profiles
- [] Cloud storage and photo libraries
- [] Subscription services
- [] Domain names and websites

Password plan

- [] Use a password manager and list the master password in a secure location.
- [] Avoid storing passwords only in your phone or browser.
- [] Name a digital executor who knows how to access your password manager.
- [] Review and update passwords at least once a year.

Digital asset instructions

- [] Decide which accounts should be closed, memorialized, or transferred.
- [] Specify who inherits digital photos, videos, and documents.
- [] List any online businesses, revenue streams, or intellectual property.
- [] Note cryptocurrency wallets and recovery phrases stored securely.

Social media legacy

- [] Facebook: choose a legacy contact in Settings.
- [] Google: set up an inactive account manager.

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- [] Apple: add a legacy contact for iCloud data.
 - [] Write down your wishes for each platform so your executor knows what to do.

Keep it updated: Revisit this checklist once a year or after any major life change — marriage, divorce, birth, death, business sale, or new investment. Your digital estate should grow and change with your life.