



Protecting Your Digital Estate – Worksheet for Creating a Digital Asset Plan

Select your Digital Personal Representative (DPR): Think about whom you would want to access your computer, your email, and your online accounts in your absence. This person will need to have some computer know-how. This may be different than the Personal Representative for your estate. It would be a good idea to talk to this person now to let them know that you are including a Digital Asset Plan in your Estate Plan.

Name your DPR: _____

DPR's Phone and Address: _____

Provide Instructions to your DPR: Think about how you want your DPR to manage your digital assets. We have provided tables on the following pages to assist you in listing all your digital assets and providing notes specific to those assets. You may also want to consider if there are any instructions that you want your DPR to apply to all your accounts. For example, you might instruct your DPR to close all your accounts and to provide any tangible assets obtained back to your Personal Representative for distribution consistent with the rest of your Estate. In addition, you may want to consider in memoriam, or notification options for certain types of accounts.

Draft Instructions for your DPR that apply to all your digital assets: _____

Provide a Mechanism for Access: We strongly encourage you to use a password manager. You can create an account at a password manager site such as LastPass.com, DashLane.com, or 1Password.com and your DPR will only need one username and password to access all your digital assets. Keep this password in a safe place (even in a safe deposit box), and provide instructions to you DPR how to access it. (Do not store it unprotected on your computer; if it is stolen, the thief would have all your passwords.)



Note: You must maintain and update this password manager site or list for it to be useful to your DPR. Many of these tools have browser add-ons or apps that make it easy to keep the password list updated. In addition, they can assist you in generating secure passwords, making your accounts safer during your lifetime.

Additional Considerations: Consider work related or business accounts as well, and whether you want to designate someone different to have access to those accounts. Note: work accounts may be owned by your employer.

Draft Instructions related to your work or business related digital assets: _____



Social Media Accounts:

List all social media accounts you currently have (include sties for photo sharing, blogging, microblogging, dating, community, meetup, etc.):

Site:	Username:	Directions (e.g. delete, archive, create memorial page, etc.)
<input type="checkbox"/> Facebook		
<input type="checkbox"/> Facebook (Business Page)		
<input type="checkbox"/> LinkedIn		
<input type="checkbox"/> Twitter		
<input type="checkbox"/> Instagram		
<input type="checkbox"/> Pinterest		
<input type="checkbox"/> Match.com		
<input type="checkbox"/>		
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Online Retailer Accounts:

List all services that you use to sell products or services online:

Site:	Username:	Directions (e.g. delete, archive, distribute funds to _____, etc.)
<input type="checkbox"/> eBay		
<input type="checkbox"/> Etsy		
<input type="checkbox"/> Craigslist		
<input type="checkbox"/> Amazon		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
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List all services that you use to buy products or services online and/or which may have rewards, miles, or other assets associated with them (include gaming accounts, digital asset accounts like iTunes, airline miles, hotel and rental car accounts, casino points, ticketmaster, credit cards, etc.):

	Site:	Username:	Associated Asset?	Directions (e.g. delete, archive, distribute funds to _____, etc.)
<input type="checkbox"/>	eBay			
<input type="checkbox"/>	Amazon Prime			
<input type="checkbox"/>	Target			
<input type="checkbox"/>	Walmart			
<input type="checkbox"/>	Google			
<input type="checkbox"/>	iTunes			
<input type="checkbox"/>	Pandora			
<input type="checkbox"/>	Netflix			
<input type="checkbox"/>	Hulu			
<input type="checkbox"/>	xBox Live			
<input type="checkbox"/>				
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Non-Retail Asset Accounts:

List all other online accounts that may have assets associated with them (include wallet accounts, software license accounts, website hosting and domain accounts, etc.):

	Site:	Username:	Associated Asset?	Directions (e.g. delete, archive, distribute funds to _____, etc.)
<input type="checkbox"/>	Paypal			
<input type="checkbox"/>	Google Pay			
<input type="checkbox"/>	Apple Pay			
<input type="checkbox"/>	GoDaddy			
<input type="checkbox"/>	WordPress			
<input type="checkbox"/>	Microsoft			
<input type="checkbox"/>	Adobe Cloud			
<input type="checkbox"/>	eTrade			
<input type="checkbox"/>				
<input type="checkbox"/>				
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Note: Consider the value of any generated content and copyrights for online works that may exist on blogs or other sites.

Notes on any potential copyrighted works: _____



Hardware with Digital Assets:

List all hardware that you own which might contain digital assets or important files (include computers, hard drives, backups, discs, phones, tablets, flash drives etc.)

Site:	Location:	Directions (e.g. delete, archive, distribute to _____, etc.)
<input type="checkbox"/> Desktop Computer		
<input type="checkbox"/> Laptop Computer		
<input type="checkbox"/> Phone		
<input type="checkbox"/> Tablet		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
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