

Digital Estate Planning Worksheet

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Instructions:

Use the instructions and the attached worksheets to begin building your digital estate plan. Record your important accounts, passwords, preferences, and trusted contacts so your loved ones know how to manage your digital presence if you're no longer able to. Attach extra pages if needed. Store this worksheet securely and update it regularly.

1. Digital Accounts Inventory

List the accounts you use to manage money, store data, or access online services.

Examples: Online banking, PayPal, Venmo, Email accounts, Social media (Facebook, Instagram, X, etc.), Cloud storage (Google Drive, iCloud, Dropbox), Streaming (Netflix, Spotify, Hulu), Online subscriptions or shopping accounts (Amazon, Etsy), Personal websites or domains

2. Password Management

Do you use a password manager? If so, include the service name and an emergency access contact.

Password Manager Used: _____

Emergency Access Contact Name: _____

Phone/Email: _____

3. Legacy Contacts

Some platforms allow you to assign a "legacy contact" to manage or delete your account after death. Remember, you have to set this in each of those platforms, this form is to document your contacts.

4. Digital Will Instructions

Clearly state who should have access and what should happen to each account or file.

Digital Executor Name: _____

Location of the Document: _____

Instructions: (See attached)

5. What to Preserve or Delete

List any specific data or accounts you want saved or deleted

6. Device Access

Record your devices and access instructions.

Digital Accounts Inventory

NAME:

Accounts used to manage money, store data, or access online services.

[illegible]

Legacy Contacts

NAME:

Assign a "legacy contact" to manage or delete your account after death. *Remember, you have to set this in each of those platforms, this form is to document your contacts.*

[illegible]

What to Preserve or Delete

NAME:

List of specific data or accounts to save or delete.

Digital Will Instructions

NAME:

Clearly state who should have access and what should happen to each account or file.

Digital Executor Name: _____

Location of the Document: _____

Instructions:

Device Access

NAME:

All devices and access instructions

[illegible]