

# Digital Estate Planning

This playbook outlines the necessary steps to effectively include digital assets, such as online accounts, social media profiles, and digital files, in your estate planning. It aims to guide individuals in preparing their digital legacy for inclusion in a will or trust.

## Step 1: **Inventory**

Compile a comprehensive list of all digital assets, including social media accounts, online banking, email accounts, digital stores, cloud storage, and any digital files of significance.

## Step 2: **Access Details**

Gather and document login information, passwords, and any other necessary details required to access each digital asset.

## Step 3: **Assign Heirs**

Determine and designate an heir or multiple heirs for each digital asset, taking into consideration the nature of the content and the wishes of the heir(s).

## Step 4: **Digital Executor**

Appoint a digital executor, who will be responsible for managing and executing your digital estate plan according to your wishes.

## Step 5: **Legal Documents**

Amend your will or trust to include the digital assets inventory, access details, list of heirs, and the appointment of a digital executor. Ensure the documents comply with applicable laws.

## Step 6: **Secure Storage**

Store the access information securely (e.g., in a password-protected digital vault) and ensure your digital executor and attorney have the means to access it when needed.

## Step 7: **Review Regularly**

Regularly update your digital assets inventory, access information, and legal documents to reflect changes in assets or account details.

# **General Notes**

## **Legal Advice**

Consult with an estate planning attorney to ensure all steps comply with current laws and regulations concerning digital assets.

## **Privacy Considerations**

Be mindful of privacy when documenting sensitive information and ensure secure protocols are followed to protect it.