

# Digital Assets Estate Planning

This playbook outlines the steps necessary to include digital assets, like online accounts and digital property, in an individual's estate plan. It guides through the process from taking inventory of digital assets to updating and maintaining the digital estate plan.

## Step 1: **Inventory**

Compile a list of all digital assets and accounts, including social media, online banking, email accounts, online retail accounts, and any crypto-assets or digital collectibles.

## Step 2: **Access**

Gather all necessary login information such as usernames, passwords, and answers to security questions, ensuring you have full access to all listed digital assets.

## Step 3: **Instructions**

Document your wishes for each digital asset upon your passing. Decide whether each account should be deleted, memorialized, or if specific content should be preserved or distributed.

## Step 4: **Legal Compliance**

Review and comply with service providers' terms of service regarding posthumous access and control of digital assets. Also, navigate

through any relevant laws, such as the Revised Uniform Fiduciary Access to Digital Assets Act (RUFADAA) in the United States.

## **Step 5: Add to Estate Plan**

Include the inventory, access information, and detailed instructions for your digital assets in your estate plan. This could be incorporated in the will, a trust, or a specific digital estate plan.

## **Step 6: Secure Storage**

Ensure all collected information is stored securely, such as in a lockbox or with a trusted digital storage service. Access to this information should only be available to your designated executor or trustee.

## **Step 7: Regular Updates**

Maintain the accuracy of your digital estate plan by regularly updating the inventory and access information to reflect any changes or additions to your digital assets.

# **General Notes**

## **Confidentiality**

Take special care to maintain confidentiality and security of your digital assets, especially when storing access information.

## **Legal Consultation**

Consider consulting with an attorney who specializes in estate planning to ensure that your plan complies with current laws and digital platforms' policies.

