

Digital Estate Planning Checklist

A one-page checklist covering all five steps.

Step 1: Make an Inventory

- List all email accounts
- List all financial accounts (banks, investments, PayPal, crypto)
- List all social media accounts
- List all cloud storage accounts
- List all shopping accounts
- List all subscriptions
- List all travel/loyalty programs
- List all healthcare portals
- List all government accounts
- List all smart home devices and apps
- List all AI service accounts
- List all devices (phones, tablets, computers)
- List all domain names and websites

Step 2: Choose a Digital Executor

- Select a trustworthy, tech-comfortable person
- Have the conversation about responsibilities
- Give them access to credentials (password manager, sealed document, or safe)
- Make sure they can unlock your phone and computer
- Name a backup executor

Step 3: Secure Your Credentials

- Set up a password manager (Bitwarden, 1Password, NordPass, or Proton Pass)
- Migrate away from LastPass if currently using it
- Document passkey locations and backup methods
- Enable emergency access in your password manager
- Consider a printed backup in a fireproof safe

Step 4: Set Up Platform Legacy Features

- Google: Enable Inactive Account Manager
- Apple: Add Legacy Contact and share access key
- Facebook: Set memorialization preferences and legacy contact

- Microsoft: Document Next of Kin process
- X (Twitter): Plan for deactivation (no reliable legacy feature)
- LinkedIn: Document closure process
- Instagram: Document memorialization process

Step 5: Put It in Your Will

- Name digital executor explicitly
- Reference inventory location
- Specify wishes for social media (memorialize vs. delete)
- Specify wishes for domain names and websites
- Grant authority to access and close accounts
- Review with estate attorney

Ongoing

- Review inventory every 6-12 months
- Update after major life changes
- Update when adding new devices or accounts