



BOULAY

# CREATING A DIGITAL ESTATE PLAN



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# CAPTURING YOUR LIFE ONLINE



## DID YOU KNOW?

As of 2019:

- There are 5.11 billion unique mobile users in the world
- There are 4.39 billion internet users
- There are 3.28 billion social media users

Technology has changed the way we interact with others, how we keep in touch, and how we manage our affairs. In our world today we have almost instant access to our financial information, our files are stored in the cloud, and we make instant purchases with almost instant delivery.

Social media plays a big role in passing along the information about all of the important events in our life. We use it as a means to reach those close and not so close. It has been described as the town square of the 21<sup>st</sup> century.

If you Google “digital access to accounts and social media after someone dies” you get 240 million results, which include links to instructions on how to close social media accounts after some has passed, advice about including your digital assets in your will, and related searches for accessing online accounts after death.



# CAPTURING YOUR LIFE ONLINE



## THE COST OF DIGITAL PRIVACY

One of the most significant laws of this century, the Revised Uniform Fiduciary Access to Digital Assets Act, has been adopted by most states. Digital assets like email and online photo accounts are subject to a web of federal and state laws covering electronic communication and privacy, which in turn governs the service providers terms of service agreements.

Those agreements guarantee user confidentiality, **even after death**. Adding this burden to the already difficult part of dealing with the passing of a loved one, comes the task of finding information that until recently would be available on paper.

## HOW DO YOU MAKE THINGS EASIER FOR THOSE SURVIVING YOU?

1. Use this guide to make a list of all your digital assets and how to access each one.
2. Decide what you want done with these assets.
3. Name a digital “executor.”
4. Store this information in a secure but accessible location.

## IMPORTANT!

Note any changes to password and online credentials as they occur. Failure to update may result in access issues and potential loss of information.

# MY DIGITAL ASSETS

## CATALOGUE YOUR DIGITAL ESTATE

Listed below are some of the digital media that you may commonly use that store important personal data. Keeping record of accounts that process personal and financial assets enables, in the event of death, these accounts to be managed according to the deceased's wishes, including account erasure or transfer.

If any accounts are not listed below, you can keep track of additional assets in the "Notes" section on page 9.



### Password Manager

Even if you don't have a Password Manager, which are applications that create and store encrypted passwords for customers, you should include where you keep your passwords in the "Notes & Instructions" field below:

**Service:**

---

**Login Information:**

---

**Notes & Instructions:**

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### Devices

If the codes for your devices are included in your Password Manager account, state as such on the "Unlock/ Access Code" line for each item:

**Phone Unlock/Access Code:**

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**Computer Unlock/Access Code:**

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**Tablet Unlock/Access Code:**

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**Other Unlock/Access Code:**

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# MY DIGITAL ASSETS



## Email

**Login:**

**Instructions:**

<b>Gmail</b>		
<b>Yahoo</b>		
<b>AOL</b>		
<b>Outlook/Hotmail</b>		
<b>iCloud</b>		
<b>Other</b>		

AOL, Microsoft (Outlook/Live/Hotmail/MSN) and Apple (iCloud) each have specific conditions in regard to Account transferral and deletion following the death of the Account owner. Click the link for the [Microsoft Next-of-Kin Process](#), and see below for information from Apple per the [iCloud Terms of Service](#) and AOL's transferral policy.

### No Right of Survivorship

You agree that your Account is non-transferable and that any rights to your Apple ID or Content within your Account terminate upon your death. Upon receipt of a copy of a death certificate your Account may be terminated and all Content within your Account deleted. Contact iCloud Support at [www.apple.com/support/icloud](http://www.apple.com/support/icloud) or call their main support number: **1-800-275-2273** for further assistance.

### AOL Transferral Policy

In the unfortunate event of a death of the billing contact for an AOL account, ownership can easily be transferred to another AOL Username already listed under the account.

**Note:** If you don't own a Username on the AOL account and would like to make changes to the account, please contact one of our AOL Customer Support Team Representatives at **1-800-827-6364**.

# MY DIGITAL ASSETS



## Social Media

**Login:**

**Instructions:**

<b>Facebook</b>		
<b>Twitter</b>		
<b>LinkedIn</b>		
<b>Instagram</b>		
<b>Pinterest</b>		
<b>Snapchat</b>		
<b>Other</b>		

**Additional Notes:**



## Payment / Money Management Accounts

(Examples of services include: PayPal, Venmo, Google Pay, Samsung Pay, Apple Pay)

**Service:**

**Login Information:**

**Instructions:**

**Service:**

**Login Information:**

**Instructions:**

# MY DIGITAL ASSETS

**Service:**

---

**Login Information:**

---

**Instructions:**

---

**Additional Notes:**



## Shopping

(Examples of services include: Amazon, Target, Walmart, Best Buy)

**Service:**

---

**Login Information:**

---

**Instructions:**

---

**Service:**

---

**Login Information:**

---

**Instructions:**

---

**Service:**

---

**Login Information:**

---

**Instructions:**

---

**Additional Notes:**

# MY DIGITAL ASSETS



## Cloud Storage Accounts

(Examples of services include: Dropbox, iCloud, Google Drive, Microsoft OneDrive)

**Service:**

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**Login Information:**

---

**Instructions:**

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**Service:**

---

**Login Information:**

---

**Instructions:**

---

**Additional Notes:**



## Video Streaming Accounts

(Examples of services include: Netflix, Hulu, Amazon Prime, HBO Go)

**Service:**

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**Login Information:**

---

**Instructions:**

---

**Service:**

---

**Login Information:**

---

**Instructions:**

---

**Additional Notes:**



# MY DIGITAL ASSETS



## Music Accounts

(Examples of services include: iTunes/Apple Music, Spotify, Pandora, Amazon Music)

**Service:**

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**Login Information:**

---

**Instructions:**

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**Service:**

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**Login Information:**

---

**Instructions:**

---

**Additional Notes:**



## Travel / Ticketing / Rewards

(Examples of services include: Airlines, Rental Car, Store Rewards, Lyft/Uber, Ticketmaster)

**Airline:**

---

**Frequent Flyer #:**

---

**Instructions:**

---

**Service:**

---

**Login Information:**

---

**Instructions:**

---

**Additional Notes:**

# MY DIGITAL ASSETS



## Notes and Personal Thoughts

Use this section for any important information, personal thoughts, or anything that may not be covered in a previous section.

[illegible]



**B O U L A Y**

Estate and trust tax services provided by Boulay PLLP. Legal services provided by Andrew Kremer Law.

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