

Planning for digital assets

This worksheet is designed to help you gather information about your digital assets and create an initial plan for how you want them handled. Once completed, it's a good idea to share it with an advisor or lawyer who can assist you in incorporating your instructions into your power of attorney and your will. Review this worksheet regularly to confirm that any new digital assets are incorporated and to update any password changes.

Your digital assets

List all your digital assets, any website, username and password* associated with them, and what (if any) monetary value they represent.

DIGITAL ASSET	PHYSICAL LOCATION OR WEBSITE	ACCOUNT/USERNAME	PASSWORD/PIN	MONETARY VALUE (IF ANY)
Hardware/memory storage devices				
Data/digital files				
Email, websites and social media accounts				
Accounts with stored value				
Business-related digital assets				

* Passwords are sensitive information. Keep this document in a secure place.

Your instructions

Determine what you want done with each asset upon any incapacity or after your death. For assets with monetary value, you'll need to decide how they should be distributed to your heirs, and include the names of your beneficiaries, bearing in mind that a probated will is a public document. For other assets, you may want them simply closed, or in the case of a website, the access rights transferred to someone else.

DIGITAL ASSET	ACTION TO BE TAKEN	BENEFICIARIES (IF APPLICABLE)
Hardware/memory storage devices		
Data/digital files		
Email, websites and social media accounts		
Accounts with stored value		
Business-related digital assets		

Naming an attorney/representative and a trustee

Think about who you would like to name as an attorney/representative to carry out instructions during your lifetime in the event of incapacity, and a trustee to carry out instructions upon your death.

Attorney/representative name: _____

Attorney/representative address: _____

Trustee name: _____

Trustee address: _____



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