

MASTERING YOUR DIGITAL LEGACY

An organized strategy for cataloging, protecting, and passing on your digital assets in a 60-minute framework.



THE DIGITAL DILEMMA

Why we need a strategy for the invisible estate.



THE SCALE OF THE PROBLEM

100

+

Average Online Accounts Per User
90% of individuals have no formal plan
for account access transfer.

DEFINING YOUR DIGITAL ASSETS



FINANCIAL

Banking, crypto wallets, brokerage accounts, and monetized blogs or channels.



PERSONAL

Cloud photo libraries, personal emails, and digital family heirlooms.



SOCIAL

Facebook, Instagram, and LinkedIn profiles for memorialization or deletion.



THE 4-STEP FRAMEWORK

Transitioning from chaos to an organized digital estate.



THE PLANNING ROADMAP

01. INVENTORY

Identify all digital assets and account types.



02. ACCESS

Implement secure password management.



03. LEGACY

Set up platform-specific legacy tools.



04. LEGAL

Name a digital executor in your will.



STEP 1: THE INVENTORY BLUEPRINT

AUDIT YOUR DIGITAL LIFE

Start with a high-level categorization. Don't worry about passwords yet—focus on the "Where."

- ✓ Categorize by Financial, Social, and Personal.
- ✓ Identify assets with actual monetary value (Crypto, Points).
- ✓ List devices (Laptop, Phone, Tablets).



STEP 1: A Closer Look

FINANCIAL ACCOUNTS

- ✓ Tangible Financial Accounts: Banks, Credit Unions.
- ✓ Identify assets with actual monetary value (Crypto, Points).

SOCIAL ACCOUNTS

- ✓ Social Media, Photos, Data, Storage
- ✓ Shopping & Sales producing platforms

PERSONAL ACCOUNTS

- ✓ Email accounts, small business accounts
- ✓ Pharmacy, Medical accounts, Biodata, your automobile



List devices (Laptop, Phone, Tablets).

LEGACY TOOLS COMPARISON

Platform	Feature Name	Action Provided
Google	Inactive Account Manager	Share data or delete account after a set period of inactivity.
Apple	Legacy Contact	Grants access to photos, messages, and files via a unique key.
Facebook	Legacy Contact	Allows memorialization and pinned post management by a friend.



SECURITY VS. ACCESSIBILITY: A personal choice



THE PASSWORD MANAGER





Tools like 1Password or Bitwarden act as the "Master Key." Use the "Emergency Access" feature to designate a successor without sharing your daily password.



THE PHYSICAL BACKUP

Maintain a "Legacy Folder" in a fireproof safe containing hardware recovery keys, 2FA backup codes, and **digital executor instructions.**

LEGAL & FIDUCIARY STEPS

-  **RUFADAA Compliance:** Ensure your will mentions the "Revised Uniform Fiduciary Access to Digital Assets Act."
-  **Name a Digital Executor:** Designate someone specifically to handle your online life, separate from your physical estate.
-  **Update Your Will:** Explicitly grant the power to access, manage, and close digital accounts.
-  **Privacy Guardrails:** Clearly state if certain accounts (e.g., private journals) should be deleted without review.

EXAMPLE: AOL Email- 10\$/month subscription

— Requesting access to/transfer of ownership of an AOL account

In very limited circumstances, and if permitted by AOL's policies and Terms of Service, AOL may allow access to/transfer ownership of a deceased user's account. To process this kind of request, AOL requires specific documentation:

- A copy of the death certificate of the AOL account holder, issued in the United States;
- A copy of the requester's government-issued ID; and
- One of the following documents:
 - A copy of the will of the deceased AOL account holder giving the requester access to digital assets; or
 - A notice of executor or notice of administration giving the requester access to digital assets; or
 - A court order issued in the United States that satisfies AOL's requirements. AOL will provide you the required language for the court order.

You can request access to/transfer of ownership of an AOL account through this [form](#).

THE ULTIMATE GOAL

PEACE OF MIND

Effective planning isn't just about data; it's about people. You are preventing administrative trauma for your loved ones.

Ensuring your photos are found, your bills are paid, and your digital footprint reflects the legacy you want to leave behind.

For organizational help
with this process please
email me:
dexit@dexitplan.com



QUESTIONS?

Your digital legacy starts with a single step today.

Visit our resource center for the
Digital Inventory Checklist.

www.dexitplan.com

IMAGE SOURCES



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