

DIGITAL LEGACY INSTRUCTIONS

A comprehensive guide to your digital life for your family

Prepared by:

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Purpose: This document provides your family with the information they need to access and manage your digital accounts, devices, and important documents if something happens to you.

Storage: Keep this document in a secure location (fireproof safe, safe deposit box, or with your attorney). Tell your executor or trusted family member where to find it.

Security Warning: This document contains sensitive information. Do not store it in an unsecured digital location. If someone finds this document, they may be able to access your accounts.

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Tip: You don't need to fill in every password directly. Instead, document *how to access* your password manager, and use it to store individual credentials. This keeps this document simpler and more secure.

1. Primary Access

This section covers the "master keys" to your digital life. With access to these, your family can access most other accounts.

Password Manager

Your password manager stores credentials for most of your accounts. This is the most important access to document.

Password Manager Used (1Password, Bitwarden, LastPass, etc.):

Account Email:

Master Password Location:

Don't write the password here. Write WHERE to find it (e.g., "In the fireproof safe, blue envelope")

Recovery/Emergency Kit Location:

Emergency Access Contact (if configured):

Primary Email Account

Email is the "recovery key" for most accounts. Accessing email enables password resets for other services.

Primary Email Address:

Access Method:

E.g., "Password in password manager" or "Password on paper in safe"

2FA Method (Authenticator app, SMS, Security key):

Recovery Codes Location:

Phone & Computer Access

Phone PIN/Passcode:

Computer Password:

Phone Type (iPhone/Android):

Computer Type (Mac/Windows):

2. Email Accounts

Document all email accounts. Note which email can recover which other accounts.

Email Address	Provider	Purpose	Recovery Email

Email Recovery Hierarchy

Document which email accounts can recover which others (important for account recovery):

Legacy Contact Settings

Major email providers offer legacy/inactive account settings. Document if you've configured these.

Google Inactive Account Manager configured? (Yes/No):

Settings → Google Account → Data & Privacy → Inactive Account Manager

Apple Legacy Contact configured? (Yes/No):

Settings → [Your Name] → Password & Security → Legacy Contact

Trusted contacts who will receive access:

2FA Recovery Codes

Location of backup/recovery codes for email accounts:

3. Financial Accounts

Document accounts containing money or financial value. Note: Your family may need legal documentation (death certificate, letters testamentary) to access these.

Bank Accounts

Institution	Account Type	Joint Owner?	Approx. Value

Investment & Retirement Accounts

Institution	Account Type	Beneficiary Designated?	Approx. Value

Credit Cards

Card / Institution	Last 4 Digits	Auto-Pay Bills?

Payment Services

PayPal Email:

Cash App:

Venmo Username:

Other:

Safe Deposit Box

Bank/Location:

Box Number:

Key Location:

4. Social Media & Online Accounts

Document social media accounts and your wishes for each (memorialize, delete, or preserve).

Platform	Username/Email	Legacy Setting?	Your Wishes
Facebook			
Instagram			
Twitter/X			
LinkedIn			
TikTok			
YouTube			
Reddit			

Facebook Legacy Contact

Legacy Contact Name:

Memorialization preference (Memorialize / Delete):

Accounts with Monetary Value

Note any accounts that generate income or have monetary value (monetized channels, creator funds, etc.):

Shopping & E-commerce Accounts

Platform	Email/Username	Saved Payment?
Amazon		
eBay		

5. Cloud Storage & Photos

Where your digital memories and files are stored. These are often the most emotionally valuable digital assets.

Important: Many cloud services will delete accounts after extended inactivity. Your family should download important content as soon as possible after gaining access.

Service	Account Email	What's Stored There
Google Drive/Photos		
iCloud		
Dropbox		
OneDrive		
Amazon Photos		

Local Backups

External hard drives (location and what's on them):

Are any backups encrypted? If so, password/key location:

Photo Preservation Instructions

Specific photos, albums, or content that is especially important to preserve:

Content to Delete

Any content you'd prefer to be deleted rather than preserved:

6. Subscriptions & Services

Recurring payments that should be cancelled, and services that may contain valuable content.

Streaming & Entertainment

Service	Account Email	Payment Method	Monthly Cost
Netflix			
Spotify/Apple Music			
Disney+/Hulu			
YouTube Premium			

Software & Productivity

Service	Account Email	Payment Method	Annual Cost
Microsoft 365			
Adobe Creative Cloud			

Gaming

Platform	Username/Email	Subscription	Purchased Content?
Steam			
PlayStation			
Xbox			
Nintendo			

Other Recurring Subscriptions

Service	Account	Cost	Cancel / Transfer?

7. Devices & Hardware

Physical devices that may contain data or require access codes.

Mobile Devices

Device	PIN/Passcode	Biometric Backup?	Associated Account
Primary Phone			
Tablet			
Smartwatch			

Computers

Device	Password	Encrypted?	What's Stored
Primary Computer			
Work Computer			
Laptop			

Smart Home & Security

WiFi Network Name:

WiFi Password:

Security System Code:

Smart Home Hub:

Hub Account Email:

Garage Door Code:

Physical Security

Home Safe Combination:

Safe Location:

Filing Cabinet Key Location:

Other Access Info:

External Storage

Device/Drive	Location	Encrypted?	Contents

8. Cryptocurrency & Digital Assets

Crypto assets require special handling. Without the proper keys, they are permanently unrecoverable.

CRITICAL: Seed phrases / recovery phrases are the ONLY way to recover crypto wallets. If these are lost, the assets are permanently gone. Store them securely but ensure your family can access them.

Exchange Accounts

Exchange	Account Email	2FA Method	Approx. Value
Coinbase			
Kraken			

Hardware Wallets

Hardware Wallet Type (Ledger, Trezor, etc.):

Physical Location of Device:

Device PIN:

Seed Phrase Location:

Document WHERE the seed phrase is stored, not the phrase itself in this document

Software Wallets

Wallet App	Assets Held	Seed Phrase Location

Other Digital Assets

NFT Holdings (platform and wallet):

DeFi Positions:

Domain Names (registrar and account):

Crypto Estate Instructions

Special instructions for handling cryptocurrency assets:

9. Important Contacts

People your family should contact or may need to work with.

Legal & Financial Professionals

Role	Name	Phone	Email
Attorney / Lawyer			
Financial Advisor			
Accountant / CPA			
Insurance Agent			
Banker			

Employment

Employer:

HR Contact:

Manager/Supervisor:

Benefits to Claim (life insurance, 401k, etc.):

People to Notify

Friends, colleagues, or others who should be notified:

Name	Relationship	Contact Info

Name	Relationship	Contact Info

Medical

Primary Care Doctor:

Health Insurance:

Phone:

Policy Number:

10. Legal Documents

Where to find important legal documents. Many institutions require original documents, not copies.

Estate Planning Documents

Document	Location of Original	Attorney/Preparer
Last Will & Testament		
Trust Documents		
Power of Attorney (Financial)		
Healthcare Power of Attorney		
Living Will / Advance Directive		

Insurance Policies

Type	Company	Policy Number	Beneficiary
Life Insurance			
Life Insurance (2)			
Home/Renters			
Auto			

Property & Titles

Property/Asset	Document Location	Notes
Home Deed		
Vehicle Title(s)		

Identity Documents

Birth Certificate Location:

Passport Location:

Social Security Card Location:

Marriage/Divorce Docs:

11. Instructions & Wishes

Beyond access, your family needs to know what you want done. Clear instructions reduce their burden during an already difficult time.

Digital Legacy Wishes

Social Media Accounts (memorialize, delete, or leave as-is):

Email Account (auto-reply message, preserve, delete):

Photos/Videos (what to preserve vs. delete):

Accounts to Cancel Immediately

- _____
- _____
- _____
- _____

Accounts to Maintain (at least temporarily)

- _____
- _____
- _____

Messages for Loved Ones

Location of any letters, videos, or messages you've prepared:

Charitable Wishes

Organizations or causes you'd like supported:

Additional Notes

This document was created using the Digital Legacy Instructions template from EstateHelm.

For a digital solution that stays updated and releases automatically to beneficiaries, visit estatehelm.com

This is not a legal document. Consult an attorney for estate planning.