



## Digital Asset & Legacy Planning Checklist

Use this checklist to organize your digital assets, secure access information, and ensure your loved ones can properly manage your online accounts and legacy messages.

### Personal Information

- Full Name: \_\_\_\_\_
- Primary Email Address: \_\_\_\_\_
- Location of Will / Estate Documents: \_\_\_\_\_
- Digital Executor (if assigned): \_\_\_\_\_

### Email Accounts

Review platform policies and assign Legacy Contacts, Inactive Account Managers, etc.

- |                                        |                                                     |
|----------------------------------------|-----------------------------------------------------|
| <input type="checkbox"/> Gmail _____   | <input type="checkbox"/> Proton _____               |
| <input type="checkbox"/> Outlook _____ | <input type="checkbox"/> AOL _____                  |
| <input type="checkbox"/> Yahoo _____   | <input type="checkbox"/> Other Email Accounts _____ |
| <input type="checkbox"/> iCloud _____  |                                                     |

### Social Media Accounts

Review platform policies and assign Legacy Contacts, Inactive Account Managers, etc.

- |                                          |                                                |
|------------------------------------------|------------------------------------------------|
| <input type="checkbox"/> Facebook _____  | <input type="checkbox"/> X (Twitter) _____     |
| <input type="checkbox"/> Instagram _____ | <input type="checkbox"/> Other Platforms _____ |
| <input type="checkbox"/> LinkedIn _____  |                                                |

### Financial & Digital Property

- Cryptocurrency Wallets \_\_\_\_\_
- Payment Apps (Venmo, PayPal, etc.) \_\_\_\_\_
- Online shops (Etsy, Ebay, Mercari, etc.) \_\_\_\_\_
- Others \_\_\_\_\_
- Password Manager Used? \_\_\_\_\_

## Cloud Storage & Files

- Google Drive \_\_\_\_\_
- iCloud \_\_\_\_\_
- Dropbox / OneDrive \_\_\_\_\_
- External Hard Drives \_\_\_\_\_

## Subscriptions & Memberships

- Streaming Services \_\_\_\_\_
- Software Subscriptions \_\_\_\_\_
- Domain Names / Website Hosting \_\_\_\_\_
- Other Recurring Services \_\_\_\_\_

## Device Access

- Smartphone
- Desktop
- Laptop
- Tablet

## Digital Legacy Messages

- Have you created legacy messages?
- Who should receive them?
- Think about milestone delivery dates

***Legacy Lives On. Plan intentionally. Protect meaning. Provide clarity.***



Get started at **HeavenlyNotes.Cloud**