

KNOW WHAT EXISTS. DECIDE WHAT HAPPENS. TELL THE RIGHT PERSON.

Your Digital Estate Checklist

Work through this while you can still answer the questions. Check each item when complete; mark anything that does not apply. Use page 2 to record where the instructions live.

- ☐ **List the accounts that matter.** Include email, banking and investments, insurance, bills, cloud storage, photos, social media and any business accounts you control.
- ☐ **Identify the email and phone behind them.** Record the sign-in ID and which recovery email or phone each important account uses. A password alone may not be enough.
- ☐ **Make a plan for your password manager.** Check whether your provider offers emergency access. If it does, configure it and confirm the intended person can complete their part. Keep secret credentials separate from this list.
- ☐ **Plan for two-factor authentication.** Document where backup codes or spare security keys are securely stored. Keep protection enabled. Do not make your only recovery option the phone in your pocket.
- ☐ **Set up Apple Legacy Contact, if applicable.** On iPhone: Settings > your name > Sign-In & Security > Legacy Contact. Give your contact the access key. After your death, Apple requires it and a death certificate. Saved passwords and passkeys are excluded.
- ☐ **Set up Google Inactive Account Manager, if applicable.** At myaccount.google.com/inactive, choose the inactivity period, trusted contacts and data to share. This acts after the selected period, not immediately when someone needs access.
- ☐ **Protect the things you cannot replace.** Locate family photos, videos and important documents. Keep a separate backup and check that you can actually open files from it.
- ☐ **Write down what you want done.** Specify what to preserve, share, memorialize, transfer where permitted or close. Identify recurring bills and subscriptions that need attention.
- ☐ **Choose the people and confirm their authority.** Tell your trusted person where the plan lives. Work with your estate attorney on authority for death and incapacity. Possessing a login does not, by itself, establish permission to use it.
- ☐ **Walk through it together, then keep it current.** Have your trusted person find the instructions and explain the first steps. Do not leave the only copy inside an account they cannot reach. Review yearly and after major account or family changes.

No passwords on this form. Keep passwords, backup codes, PINs and crypto seed phrases in separate secure storage. A completed inventory is private; share it only with the people you choose.

FILL IN PRIVATELY. KEEP WITH YOUR PLANNING RECORDS.

Show them where to start.

Record locations and instructions, not secret credentials or full financial account numbers. The blank checklist can be shared freely. Keep your completed copy private.

Prepared for

Last reviewed

Trusted person / contact details

Alternate / contact details

Where the full instructions and secure access plan are kept

Account / service	Sign-in email or ID	Recovery instructions location / provider contact	Action / person responsible

Next action and target date

Before you put it away: Can your trusted person find the instructions without unlocking your phone or entering an account only you can access? Make sure your estate attorney has addressed the authority needed for death and incapacity.

Apple Legacy Contact: support.apple.com/en-us/102631

Google Inactive Account Manager: myaccount.google.com/inactive

Provider guidance checked October 27, 2026. Questions about setup? fbarletta@followsavvy.com. Do not send completed inventories or credentials.