

DIGITAL ESTATE

WHAT IS A DIGITAL ESTATE?

A Digital Estate is comprised of your digital assets, the rights to use those assets, and the data storage devices used. A Digital Asset is content (photo, document, eBook, music file, online account) that is stored digitally and has value. The device used to store or view the Digital Asset is also included in the definition of a Digital Asset.

WHY SHOULD YOU PLAN FOR YOUR DIGITAL ESTATE?

The law regarding the ownership and disposition of digital assets is unclear. Without a plan, your digital online presence will continue to exist, unable to be accessed, modified or deleted. The management company may terminate the account and all data will be lost. *The question is “if something happens to you tomorrow, who should have access to your digital assets?”* By making a plan, you can reduce the likelihood of identity theft, of privacy issues, and you can make the appropriate disposition of these digital assets in the same way you plan for other tangible assets. Once again, your prior planning will ease your Executor’s duty.

HOW TO GET STARTED

Complete the Digital Asset Inventory forms. List your devices and accounts. Decide what to do with the asset if you are incapacitated or die. Decide who should deal with the assets: name a Digital Executor. Discuss this with your attorney to make your designations legal.

File the Digital Asset Inventory Forms in the Legal section of your LegacyLedger™. Make a copy to store in a secure but accessible location: with your attorney, with your will or trust, in an online storage account, in a locked file or safe. In addition, give a copy to your Executor. Refer to the “Letter to Executor”, FI 6.8 in the Final Instructions section.

DIGITAL ASSET INVENTORY

DIGITAL PROPERTY EXAMPLES

| <i>DEVICES</i> | <i>DEVICE EXAMPLES</i> |
|-------------------------------------|--------------------------------------|
| <i>Hardware</i> | Computer/Laptop |
| | iPad/Tablet/eReader |
| | Smart Phone |
| | iPod/MP3 Player/Audible Player |
| | External Hard Drive |
| | DVD/CD |
| | Flash Drives |
| | Camera |
| | |
| <i>Data</i> | Data stored electronically |
| | Online |
| | Cloud |
| | On a device |
| | |
| <i>Online Accounts</i> | See Account Types Form |
| | |
| <i>Domains (websites)</i> | See Digital Asset Inventory: Domains |
| | |
| <i>Intellectual Property</i> | Patents/Trademarks |
| | Copyrights/Trade Secrets |
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DIGITAL ASSET INVENTORY

DIGITAL PROPERTY

| DEVICES | DEVICE NAME/MODEL | PASSWORD/ACCESS CODE | PIN | SECURITY/DETAILS |
|----------------|--------------------------|-----------------------------|------------|-------------------------|
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DIGITAL ASSET INVENTORY

DIGITAL ACCOUNT EXAMPLES

| <i>ACCOUNT TYPE</i> | <i>EXAMPLE</i> | <i>ACCOUNT TYPE</i> | <i>EXAMPLE</i> |
|----------------------------|--|-----------------------------------|---|
| <i>Email</i> | Gmail iCloud AOL Outlook Yahoo | Gaming | Sony PlayStation MSFT X Box Nintendo Switch |
| <i>Social Media</i> | Facebook Instagram Twitter Pinterest LinkedIn | Cloud Storage | iCloud Google Drive Drop Box One Drive |
| <i>Blogging</i> | Lincoln Hills GoogleGroup MacMost | Music | Amazon Apple Music |
| <i>Shopping</i> | Amazon Online Shopping ANYWHERE | eBooks Audible Books | Kindle Apple Books Amazon Audibles |
| <i>Money Management</i> | Quicken Mint QuickBooks Personal Capital YNAB | Photo Sharing | Apple Photos YouTube Flicker Google Photos |
| <i>Banking/Investing</i> | Personal Banking Account Investment Brokerage Account | Software Licenses | Microsoft Office TurboTax Quicken |
| <i>Messaging/VOIP</i> | Apple Message Facebook Messenger Facetime WhatsApp Skype | Frequent Flyer Reward Programs | Airlines Hotels Restaurants |
| <i>Medical Records</i> | Health Care System App Apple Health | Video Streaming | Netflix YouTube TV Amazon Video Apple TV Hulu |

DIGITAL ASSET INVENTORY

DIGITAL ACCOUNTS

| <i>WEBSITE ADDRESS</i> | <i>USER NAME</i> | <i>PASSWORD</i> | <i>PIN</i> | <i>SECURITY/DETAILS</i> |
|-------------------------------|-------------------------|------------------------|-------------------|--------------------------------|
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DIGITAL ASSET INVENTORY

DIGITAL ASSETS

| <i>WEBSITE ADDRESS</i> | <i>USER NAME</i> | <i>PASSWORD</i> | <i>PIN</i> | <i>SECURITY/DETAILS</i> |
|------------------------|------------------|-----------------|------------|-------------------------|
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DIGITAL ASSET INVENTORY

DIGITAL ACCOUNTS: EMAIL

| <i>EMAIL HOST</i> | <i>EMAIL ADDRESS</i> | <i>PASSWORD</i> | <i>SECURITY/DETAILS</i> |
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DIGITAL ASSET INVENTORY

DIGITAL ASSET MANAGEMENT EXECUTOR

| <i>DIGITAL ACCOUNT OR ASSET</i> | <i>DIGITAL EXECUTOR</i> | <i>FINAL INSTRUCTIONS</i> |
|--|--------------------------------|----------------------------------|
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DIGITAL ASSET INVENTORY

DIGITAL ASSET MANAGEMENT DOMAIN REGISTRATION

| | | |
|---------------------------------|------------------|---------------------|
| DOMAIN NAME | | |
| REGISTRY FOR DOMAIN NAME | | |
| CONTACT NAME/POSITION | | |
| EMAIL/WEBSITE | | |
| PHONE | | |
| INITIAL CONTRACT DATE | | RENEWAL DATE |
| INITIAL REGISTRATION FEE | | |
| LOG IN | USER NAME | PASSWORD |
| REGISTRANT/OWNER | | |
| ADMINISTRATIVE CONTACT | | |
| NAME | | |
| EMAIL | | |
| ADDRESS | | |
| PHONE | | |
| BILLING/RENEWAL CONTACT | | |
| NAME | | |
| EMAIL/PHONE | | |
| BILLING ADDRESS | | |
| RENEWAL FREQUENCY/DATES | | |
| PAYMENT METHOD | | |

DIGITAL ASSET INVENTORY

DIGITAL ASSET MANAGEMENT WEBSITE HOST

| | | |
|---|--|---------------------|
| WEBSITE HOST | | |
| CONTACT NAME/POSITION | | |
| EMAIL/WEBSITE | | |
| PHONE | | |
| INITIAL CONTRACT DATE/FEE | INITIAL DATE | INITIAL FEE |
| RENEWAL/FREQUENCY DATES | RENEWAL FREQUENCY | RENEWAL DATE |
| LOG IN | USER NAME | PASSWORD |
| ORGANIZATION WEBMASTER CONTACT | | |
| NAME | | |
| EMAIL | | |
| ADDRESS | | |
| PHONE | | |
| ORGANIZATION BILLING/RENEWAL CONTACT | | |
| NAME | | |
| EMAIL | | |
| BILLING ADDRESS | | |
| PHONE | | |
| PAYMENT METHOD | | |
| GO TO WHOIS.COM | SEARCH FOR DOMAIN NAME. PRINT OUT DOCUMENT AND ATTACH FOR VERIFICATION. | |
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