

# Digital Estate Readiness Checklist

## For Individuals and Families

Use this checklist to get organised and give your loved ones clarity when it matters most.

*Check off what you've already done — circle what you'd like help with.*

### How to use this checklist

This document covers 9 sections of your digital estate — from the people who should help, to the accounts, documents, and devices they'll need to find.

Print this checklist, work through each section, and store it somewhere trusted — alongside your digital estate plan.

**1 — About You**

**4 — Supporting Documents**

**7 — Devices & Access**

**2 — Key People**

**5 — Money & Accounts**

**8 — Delegations**

**3 — Estate Documents**

**6 — Email & Social Media**

**9 — Keeping Up to Date**



## Section 1 — About You

### **For individuals:**

- My full legal name, birthdate, and current address are written down in one place.
- My main email address and phone number are clearly listed.
- I have chosen a trusted person to help with my digital affairs if needed.
- I have written down their name and contact information.
- I have a safe place (binder, folder, or secure vault) where this information is stored.

### **For households / families:**

- We have a household name or label (e.g. "Smith Family").
- We know who the primary contact person is for important decisions.
- We have listed how many adults and dependents live in our household.
- Any special care needs for children, seniors, or others are written down.
- We have a shared place (binder, folder, or secure vault) for family documents.



## Section 2 — Key People & Helpers

- Primary emergency contact listed (name, phone, relationship).
- Backup emergency contact listed.
- Health care decision-maker identified and documented.
- Person who can help with money and bills identified.
- Tech-savvy helper identified for accounts and devices.
- Lawyer, financial planner, or tax preparer details written down (if applicable).

### **For families:**

- Guardians for minor children or dependents chosen and written down.
- Caregivers or home-health contacts listed (if applicable).



## Section 3 — Core Estate Documents

Check off what you have (even if you're not sure where the original is):

- Last Will and Testament.
- Living or Revocable Trust.

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- Financial Power of Attorney.
  - Health Care Power of Attorney / Health Care Proxy.
  - Advance Directive / Living Will for medical wishes.
  - HIPAA form allowing others to see medical information.
  - Beneficiary forms for life insurance and retirement accounts.
  - A clear note about what should happen to my digital accounts and online life.

***For families:***

- Each adult has their own will or basic estate documents.
- Guardians for children or dependents are written into at least one document.

## Section 4 — Important Supporting Documents

- Personal ID (driver's licence, passport) copied or noted.
- Birth certificate (and adoption papers if applicable).
- Marriage certificate and/or divorce papers (if applicable).
- Social Security information noted in a safe place.
- Life, health, home, and auto insurance details recorded.
- Home deed or lease information written down.
- Vehicle titles and registrations listed.
- Recent tax returns (last 1–3 years) stored where someone can find them.
- Safe-deposit box location, key, and who can access it.
- Any business ownership or partnership documents noted.
- Memberships, charities, or organisations important to you listed.
- Special notes or instructions for your family written down in your own words.

## Section 5 — Money, Bills & Subscriptions

Think about anything that takes money out of your account or bills you regularly:

- Main checking and savings accounts listed.
- Credit cards and store cards listed.
- Loans and mortgages listed (with lenders).
- Retirement accounts and investment accounts listed.
- Online payment apps (PayPal, Venmo, Cash App, etc.) listed.
- Utility accounts: power, gas, water, trash listed.
- Phone, internet, and TV providers listed.
- Insurance billing accounts listed.
- Streaming services (Netflix, Hulu, etc.) listed.
- Cloud storage and software subscriptions listed.
- Website domains and hosting accounts listed (if applicable).

***For families:***

- Each adult's income and main accounts are listed in one directory.
- Shared family subscriptions are clearly marked.



## Section 6 — Email, Social Media & Online Accounts

- Main email accounts listed (including recovery emails).
- Phone numbers and carriers listed (who has which number).
- Major social media accounts listed (Facebook, Instagram, X/Twitter, LinkedIn, etc.).
- Other online communities or forums that matter to you listed.
- Messaging apps that matter (WhatsApp, Messenger, Signal, etc.) listed.
- Instructions written for each social account (keep, memorialise, or delete).
- Instructions written for email (who, if anyone, should have access).

**For families:**

- Each adult's key social and email accounts listed.
- Children's social/gaming accounts listed (if applicable).
- Any shared "family" accounts clearly marked.



## Section 7 — Devices & Access

- My primary phone is listed (make/model and who it belongs to).
- My computer(s), tablet(s), or laptop(s) are listed.
- Any external hard drives, USBs, or home servers are listed.
- My password manager (if I use one) is listed.
- Someone I trust knows where to find the "key" to access important logins — without putting passwords in unsafe places.
- My home Wi-Fi/router information is written down in a safe place.
- Any important smart-home devices (locks, cameras, alarms, etc.) are listed.

**For families:**

- Each adult's main device is listed and labelled.
- Shared family devices are listed and labelled.
- Instructions exist for how to handle old devices (wipe, donate, or destroy).



## Section 8 — Delegations & What My Family Needs to Know

- I have written who should help with emergencies.
- I have written who should help with money and bills.
- I have written who should help with medical decisions (if needed).
- I have written who is allowed to talk to my providers (bank, doctor, advisor).

I have a simple page or letter titled "What My Family Needs to Know" that explains:

- Where things are.
- Who to call first.
- What matters most to me.

**For families:**

- We have talked as a family about who will handle different roles.
- We have a plan for children's photos, school accounts, and memories.



## Section 9 — Keeping Things Up to Date

- I have done at least one "digital checkup" in the last 12 months.
- I have removed accounts or devices I no longer use.
- I have updated my list of accounts and documents in the last year.
- I have told at least one trusted person that this plan exists and where it is.

### Turn this checklist into a secure digital plan

If you checked many boxes — you're already ahead. If you circled items you're missing, that's where we can help.

- Organise your accounts, devices, and documents into a clear, simple plan.
  - Create a private summary for your family or chosen helpers.
  - Keep everything updated so your loved ones aren't left guessing.

**Visit [digitalestateplan.com](https://digitalestateplan.com) to get started today**