

## DIGITAL ASSETS CHECKLIST

Great caution must be exercised where it concerns sensitive information such as passwords. Once documented, this information must be stored securely. The location or information can only be shared with your digital estate planner and/or digital executor. Under no circumstances should you share your passwords with anyone else as this may constitute a violation of the Terms and Service Agreement with many online providers.

### 1. Listing your Digital Assets

#### 1.1 - Make a detailed list of all Personal Digital Property INCLUDING a corresponding list of any passwords that protect your Personal Digital Property

- Document all **personal computers, laptops, and cellphones** (including the model number and serial number if possible)
- Document any passwords needed to access these personal computers, laptops, and cellphones
- Document all **personal music storage devices** (iPads, mp3 players and online storage accounts)
- Document any passwords needed to access any devices or online storage accounts (ie., Apple for iTunes music)
- Document all **storage hardware devices** (such as removable USB drives and external hard drives)
- Document any passwords needed to access any storage hardware
- Document all **personal online accounts** (including social media accounts, online banking accounts, online gaming accounts – basically anywhere you’ve stored media that you or your beneficiaries want to save)
- Document any passwords needed to access your online accounts as well as any instructions for closing or memorializing these accounts
- Document all **personal Web Domain Names** (ie., personal blog or website)

- Document any passwords needed to access the Web Domain service provider's online platform

**1.2 – Make a detailed list of all Digital Property with Monetary Value INCLUDING a corresponding list of any passwords that protect access to your property**

- Document all **websites, blogs, and social media accounts** that generate revenue
- Document the passwords needed to access the web domain providers platform for these websites, blogs, and social media accounts

- Document all **loyalty programs** and similar points or **rewards programs** that have a value or rewards attached to the account
- Document the passwords needed to access the loyalty program accounts

- Document all **digital art** including photographs, books, music (including the rights to these items)
- Document the Certificate of ownership (or Original Receipt of Purchase)

- Document all **Non-fungible Tokens** (NFTs)
- Document the location of the Certificate of ownership for any Non-fungible Tokens (NFTs)

- Document any **crypto or virtual currency** held in a digital wallet
- Document the location of your private keys or digital wallets containing crypto or virtual currency
- If there is a cold wallet, ensure this is safely secured in a fireproof safe or vault

- Document any **digital Intellectual Property** including copyrighted materials, Trademarks, Code, or applications you have developed
- Document any passwords needed (or their location) to the online platform used to access any digital Intellectual Property

**1.3 – Make a list of all Digital Business Property INCLUDING a corresponding list of any passwords that protect access to you Digital Business Property**

- Document any **Intellectual Property** owned by your business or corporation including copyrighted materials, Trademarks, Code, or any applications developed
- Document any passwords needed (or their location) to access any online platforms or devices where any Intellectual Property owned by your business or corporation is stored

- Document any stake or **shares in any digital asset** (shared ownership)
- Document any passwords needed to access any platforms or devices where these digital assets are stored

## **2. Deciding what you want to have done with assets**

**2.1 – Make a list detailing what you want done with your digital assets INCLUDING corresponding list of any passwords that protect access to your property**

- Detailed directions on how to **access password protected hardware & devices**
  - Include the passwords (or where to find them) for any password protected hardware and devices
- Detailed directions for **accessing social media accounts**
  - Include the passwords (or where to find them) for any social media accounts
- Instructions on **closing social media accounts**
  - Include the passwords (or where to find them) for any social media accounts
- Document up-to-date **instructions for third parties assisting** with the management of your digital assets

Include all previous lists and passwords to all online accounts and password protected devices

Document detailed instructions for **how your digital executor should handle your assets**

Include all previous lists and passwords to all online accounts and password protected devices

## **2.2 – Decide who to name as your Digital Executor**

**Consider some of the following characteristics of a good choice for digital executor:**

Someone you know personally and well

Someone who is not in a conflict of interest with any of your interests

Someone who is willing to take on the task and do a good job

Someone who can devote the time needed to be your executor

Someone with specific knowledge of your assets and how to handle them

Someone who is financially responsible and organized

## **3. Formalizing your Information**

**3.1 - Make a detailed list of where your information is stored INCLUDING a corresponding list of any passwords that protect access to your property**

Document where to find your list of Personal Digital Assets (one list of assets with monetary value and one list of assets without)

Make sure your digital executor is provided with this list or knows where to find it

Document where to find your Business Digital Assets

- Make sure your digital executor is provided with this list or knows where to find it
- Document where to find any master lists of all your passwords
- Make sure your digital executor is provided with this list or knows where to find it
- Document any accounts which use a Digital Wallet for any of their services
- Make sure your digital executor has the passwords and instructions for all digital wallets and where any wallets are connected to bank accounts
- Detailed instructions on how to transfer funds out of and close any accounts using a Digital Wallet

### **3.2 – Formalize your information in a legal document**

- Assign a fiduciary in a legal instrument (such as a Power of Attorney)
- Make sure that fiduciary has access and instructions for how to handle your digital assets
- Draft a will which includes how to handle your digital assets in your last wishes and instructions
- Make sure your digital assets are clearly bequeathed to beneficiaries
- Register your will with an online Registry service such as NoticeConnect's [Canada Will Registry](#)

## Helpful Tools for Digital Estate Planning

<input type="checkbox"/> Use a Password Manager	Examples: Keeper, Dashlane, LastPass, Bitwarden, LogMeOnce Password Management Suite Ultimate, Password Boss, NordPass, 1Password, RoboForm, Sticky Password, McAfee True Key, Zoho Vault.
<input type="checkbox"/> Use a Digital Estate Planner	Examples: eState Planner, Everplans, LifeSite, LifeFilez, LegacyShield, Cake, Mylennium.
<input type="checkbox"/> Use a Will Creation Tool	Examples: eState Planner, Willful, LegalWills.ca
<input type="checkbox"/> Use a Registry Tool	Examples: NoticeConnect, Canada Will Registry

*This checklist is intended for the purposes of providing information only and is to be used only for the purposes of guidance. This checklist is not intended to be relied upon as the giving of legal advice and does not purport to be exhaustive.*

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