ASPEN POLICY ACADEMY
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Workbook

Digital Legacy Workbook for Digital Estate Planning

By Jenny Tang

November 2026

This Digital Legacy Workbook was developed by an Aspen Policy Academy Fellow while participating in the 2026 Science and Technology Policy Fellowship. This workbook is intended to guide personal digital estate planning discussions. The full project, including a policy brief explaining the fellow's core recommendations, is available here. Please note that the author's opinions published here are their own. This publication does not reflect the views of the Aspen Policy Academy or the Aspen Institute.

Workbook Overview

This Digital Legacy Workbook builds on the Digital Estate Planning Logistics Checklist, providing a structured way to work through decisions with your estate planner. This document is not legally binding but is meant to guide you in providing your heirs with clear instructions for managing your digital estate and indicating your intent for the handling of your digital estate.

By the end of this workbook, you will have the opportunity to build on the checklist of accounts to determine specific actions for heirs to take; expand the initial set of accounts to include additional accounts or instructions as desired; and determine default actions for accounts not otherwise addressed.

The sections of the workbook are independent and may be completed in any order.

ACCOUNT HOLDER

DATE

RECIPIENTS

This workbook is intended to guide personal digital estate planning discussions and is not a legally binding document.

Instructions for Accounts and Digital Assets

Start with the categories of accounts identified in the Digital Estate Planning Logistics Checklist. Feel free to skip any accounts and return to them later. Digital assets (such as photo folders, cryptocurrencies, spreadsheets) can also be included in these instructions.

Example	
Account	Gmail (example123@gmail.com)
Instructions (e.g., delete account, inform contacts before account shutdown)	Delete the account after all other accounts are closed (this email is used for password reset emails). Unsubscribe from all marketing emails that come in while the email account is still active. Respond to emails from actual people with: "[My name] has passed away. This email address will no longer be active." Use Google Takeout to export all emails to have an archive.
Other Notes (e.g., number of accounts, same instructions for all accounts in this category)	Account is linked to Google Photos. Make sure to download the photos before shutting down the account.

Account 1	
Account	
Instructions (e.g., delete account, inform contacts before account shutdown)	
Other Notes (e.g., number of accounts, same instructions for all accounts in this category)	

Account 2	
Account	
Instructions (e.g., delete account, inform contacts before account shutdown)	
Other Notes (e.g., number of accounts, same instructions for all accounts in this category)	

Account 3	
Account	
Instructions (e.g., delete account, inform contacts before account shutdown)	
Other Notes (e.g., number of accounts, same instructions for all accounts in this category)	

Account 4	
Account	
Instructions (e.g., delete account, inform contacts before account shutdown)	
Other Notes (e.g., number of accounts, same instructions for all accounts in this category)	

Account 5	
Account	
Instructions (e.g., delete account, inform contacts before account shutdown)	
Other Notes (e.g., number of accounts, same instructions for all accounts in this category)	

Account 6	
Account	
Instructions (e.g., delete account, inform contacts before account shutdown)	
Other Notes (e.g., number of accounts, same instructions for all accounts in this category)	

Account 7	
Account	
Instructions (e.g., delete account, inform contacts before account shutdown)	
Other Notes (e.g., number of accounts, same instructions for all accounts in this category)	

A page for additional accounts and digital assets is provided at the end.

Default Instructions

Determine what heirs should do with any accounts and digital assets that are not explicitly mentioned in this workbook. These default instructions should be informed by your overarching goals for your digital estate (e.g., reducing burden on heirs, preserving your digital legacy, maintaining privacy).

Default Instructions

Examples: close accounts, ignore accounts, allow heirs to make their own determination

Resources

Note any relevant links or guidance for your digital estate below.

Platform Specifics

Examples: Apple Legacy Contact feature set up, which photo folders to archive or delete

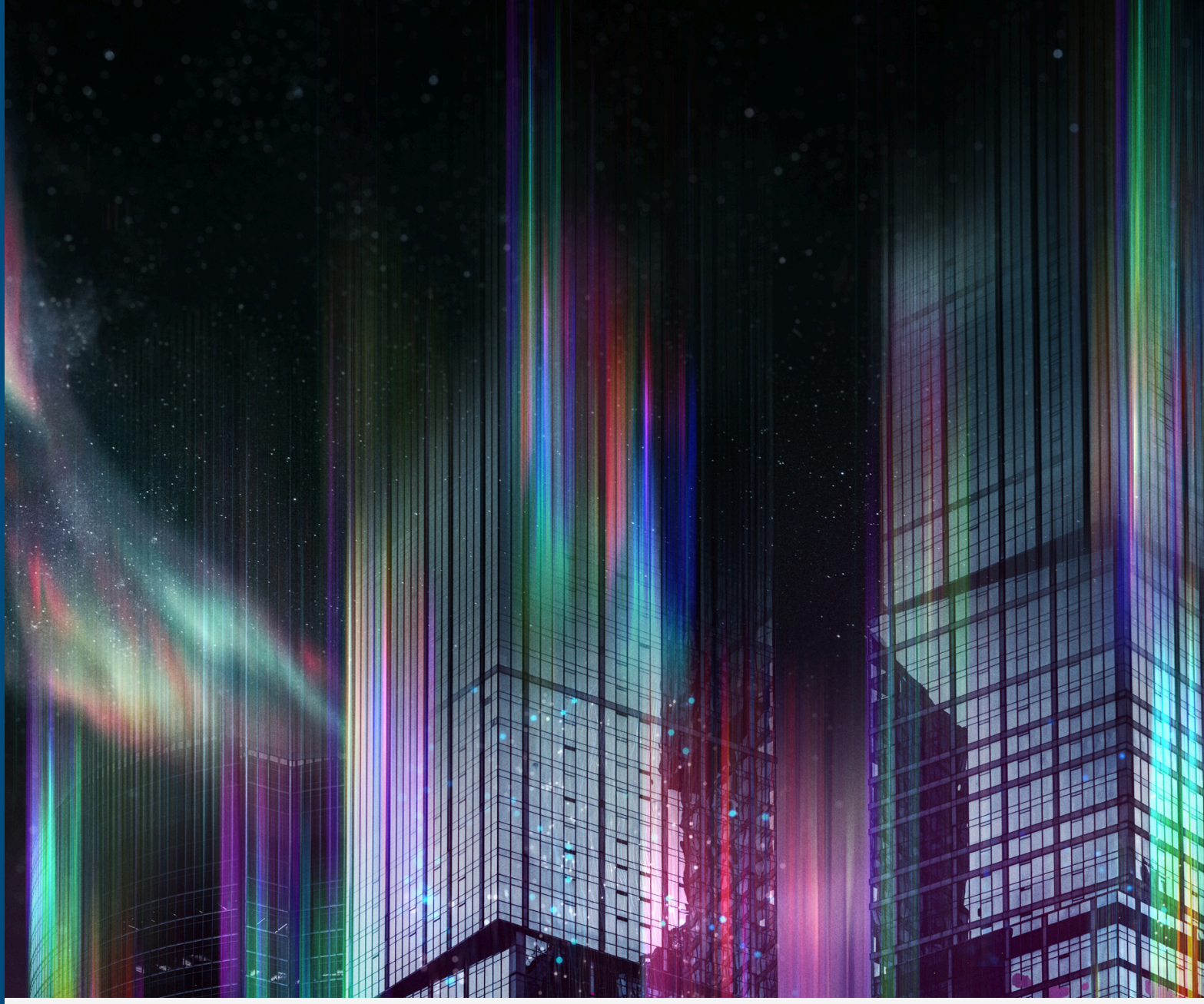
Documents

Examples: link to will, directions to find list of passwords, other estate planning documents

Contacts

Examples: contact information for estate planning professional, attorney, or financial manager

If you'd like to learn more, see the full project, including a policy brief explaining the fellow's core recommendations, at aspenpolicyacademy.org/project/digital-estate-planning-2026.



Da-kuk via Getty Images

About the Aspen Policy Academy

The Aspen Institute's Policy Academy helps community leaders and experts across the political spectrum elevate their voices, influence key decisions, and strengthen democracy from the ground up. Our innovative training programs and resources equip people across sectors – from tech to the environment, science to civic engagement – with the skills to shape critical policy efforts. Learn more at aspenpolicyacademy.org.

Appendix: Add Additional Accounts and Assets

Duplicate or print this page as needed to add accounts and digital assets.

Account	
Account	
Instructions (e.g., delete account, inform contacts before account shutdown)	
Other Notes (e.g., number of accounts, same instructions for all accounts in this category)	

Account	
Account	
Instructions (e.g., delete account, inform contacts before account shutdown)	
Other Notes (e.g., number of accounts, same instructions for all accounts in this category)	

For more resources, visit aspenpolicyacademy.org/project/digital-estate-planning-2026.