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Logistics Checklist

Digital Estate Planning Logistics Checklist

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November 2026

This Digital Estate Planning Logistics Checklist was developed by an Aspen Policy Academy Fellow while participating in the 2026 Science and Technology Policy Fellowship. This checklist is designed for estate planners and clients to work through together as part of the digital estate planning process. It helps verify that heirs will have the necessary credentials to access the client's digital estate. 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.

About the Logistics Checklist

Securing your digital assets ensures that your heirs will be able to settle your digital estate smoothly, prevent identity theft, and preserve your personal memories.

Use this checklist to ensure that sufficient information is passed on so that heirs can access and manage your digital estate. Record these up-to-date credentials in a safe location or give heirs instructions on where these credentials are currently stored. Prioritize Tier 1 accounts as the key to the rest of the digital estate.

Legal and Practical Action Items

☐ **Add Digital Estate Language to Your Will**

Work with an estate planning attorney to ensure that your legal documents include specific language that complies with the Revised Uniform Fiduciary Access to Digital Assets Act, explicitly granting fiduciaries legal authorization to access and manage your digital assets and the contents of online accounts.

☐ **Secure Passwords**

Inform heirs where passwords to relevant accounts are kept (e.g., a notebook or digital file) and any additional measures for accessing the passwords (e.g., if passwords are written with a code). Make sure the passwords are up to date.

- [ ] **Manage 2-Factor Authentication (2FA)**
  Ensure that heirs have a way to access 2FA channels (e.g., physical phone, active SIM card, recovery email, or security key) to receive verification codes. Keeping phone numbers active for a period of time for 2FA before canceling the phone plan is generally advised.

- [ ] **Check Platform Legacy Features**
  Use legacy features that are built into accounts and platforms if relevant. A brief overview of existing legacy features for common accounts (Google, Apple, Meta) is provided at the end of this checklist.

- [ ] **Document Account Specific Wishes**
  Record specific instructions stating which accounts should be deleted, memorialized, or archived. This can be done with the Digital Legacy Workbook.

Access Credentials and Passwords

Tier 1: Primary Access Credentials

These core access points serve as the gateway to the rest of your digital estate. At a minimum, ensure that heirs have these credentials available.

- [ ] **Device Passcodes and PINs** (e.g., smartphones, computers, tablets)
  Physical devices often store saved passwords, logged in sessions, and personal files that give heirs access to secondary accounts.

- [ ] **Primary Email Accounts** (e.g., Gmail, Outlook)
  Access to email accounts is needed for password resets, 2-factor authentication verification codes, and retrieval of key digital documents.

- [ ] **Password Manager Master Password** (e.g., 1Password, Dashlane, web browser)
  A password manager provides a secure, centralized location for all updated passwords. If you use a password manager, sharing your master password or granting emergency access will simplify estate settlement.

Tier 2: Financial and High Priority Accounts

Direct access to financial assets and device ecosystem controls.

- [ ] **Financial and Investment Accounts** (e.g., banking, brokerage, crypto wallets, credit cards)
  Helps heirs access funds in a timely manner and manage recurring liabilities while probate is finalized.

- [ ] **Device ID Accounts** (e.g., Apple ID, Google Account, Microsoft Account)
  Essential for managing, wiping, or transferring physical devices for heirs to reuse or archive.

Other: Accounts with Monetary Impact

Shutting down these accounts in a timely manner can prevent unauthorized charges and capture accumulated value, such as loyalty points.

- [ ] **Subscriptions and Entertainment** (e.g., Netflix, Spotify, other streaming services)
  Stops automatic recurring payments and credit card charges.

- [ ] **Shopping and E-Commerce Accounts** (e.g., Amazon, eBay, Target)
  Holds stored payment methods, pending orders, and store credits.

- [ ] **Travel and Loyalty Programs** (e.g., airline miles, hotel rewards, credit card points)
  Transfer or redeem rewards points prior to account closure (transfer and usage requirements differ by provider).

- [ ] **Utility and Household Accounts** (e.g., electric, gas, water, internet)
  Allows heirs to transfer responsibility or shut down services for a residence and prevent unnecessary recurring charges.

Other: Digital Footprint and Memories

Preserving legacies and securing physical properties.

- [ ] **Social Media Profiles** (e.g., Facebook, Instagram, Linkedin)
  Allows heirs to request account memorialization, delete profiles, or inform your contact network.

- [ ] **Cloud Storage and Photo Libraries** (e.g., Google Photos, iCloud, Dropbox, OneDrive)
  Protects irreplaceable photos and personal records from permanent deletion due to account inactivity. Allows heirs to reduce leakage of personal records and data.

- [ ] **Home Security and Smart Home Systems** (e.g., Ring, Nest, alarm systems)
  Gives heirs the necessary credentials to monitor and secure physical property.

Platform Built-In Legacy Features

Many major platforms offer built-in legacy tools that allow users to dictate who can access your accounts after your passing. These tools are useful to set up but may require periodic updates to ensure that beneficiary designations remain up to date and accurate. The following table provides an overview of the legacy features of 3 major platforms (Google, Apple, and Meta). Other platforms may also provide legacy features, with the functionality varying by platform. Note that instructions (such as deletion) set through legacy features legally supersede other directions, such as those noted in wills.

Platform and Feature	Verification Required	Level of Access Granted	Access Timing/Trigger
Google (Inactive Account Manager)	None (preauthorized by user)	Data download access for selected services	Triggered after a designated period of inactivity (3–18 months)
Apple (Legacy Contact)	Legacy contact access key plus death certificate	Photos, messages, notes, files (excludes keychain/payment info)	Immediate access upon Apple's review and approval of death certificate; automatic deletion after 1 year
Meta (Facebook, Instagram, Threads) — Memorialization or Deletion	Proof of death (obituary or death certificate)	Memorialized profile (legacy contact can manage posts/tributes) or total profile deletion	Triggered when legacy contact requests and documents submission

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.

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