# Digital Estate Access Worksheet

A secure roadmap for the person who will need to help—without putting secrets on paper.

How to use this: Fill in account names, purpose, responsible person and the location of protected access instructions. Do not write passwords, passkeys, backup codes, recovery phrases, crypto private keys or Social Security numbers on this worksheet. Store the completed worksheet privately.

## 1 | Inventory the accounts that matter

| Account type | Provider / account identifier (not secret) | Responsible person / instruction location |
|---|---|---|
| Primary email and recovery email | | |
| Banking / brokerage / billing | | |
| Cloud storage / family photos | | |
| Phone, devices and 2-step verification | | |
| Domain, website or business accounts | | |
| Social media and subscriptions | | |
| Cryptocurrency / digital wallet (no keys) | | |

A useful test: Could your representative identify each important account and request lawful access without guessing which apps you used?

# The access and authority check

The goal is a handoff that is both legally permitted and operationally possible.

## ☐ Name the primary and backup helpers

Executor / trustee / agent / technical helper: _____

## ☐ Set platform-specific legacy tools

Apple Legacy Contact reviewed: ___ Google Inactive Account Manager reviewed: ___

## ☐ Review legal authority and consent

Attorney consulted about digital assets and electronic-communications content: ___

## ☐ Secure the recovery path

Password manager or recovery instructions stored at (location only): _____

## ☐ Protect the highest-risk items

Device unlock, multifactor recovery and crypto inheritance plans reviewed: ___

## ☐ Tell the right person where to start

Trusted person informed about location of this worksheet: ___ Date: _____

## Important: access is not the same as legal authority

Provider legacy-contact tools, state fiduciary-access law, account terms, and your estate documents can affect what someone may access. The contents of email and messages can be subject to separate consent rules. Confirm the procedure with an estate attorney; do not rely on a shared password as your only plan.

## Useful primary sources

Apple Digital Legacy: support.apple.com/en-us/102631 | Google Inactive Account Manager: support.google.com/accounts/answer/3036546

Digital-asset law example (online tool priority): gc.nh.gov/rsa/html/LVI/554-A/554-A-4.htm

Next review date: _____ Worksheet location: _____

Companion to the Estate Planning Checklist at michaelryanmoney.com/estate-planning-checklist-downloadable/ • Prepared October 2026