

You were named as a

Digital Executor. Now What?

What the role means and how to prepare

Someone close to you has named you as their digital executor. Being named is a meaningful expression of trust. It means someone looked carefully at the people in their life and chose you for a role that matters to them. It is also a responsibility worth understanding well before it is ever needed.

This guide explains what the role involves, the choices available to you, and a few practical steps you can take now so you are prepared if you are ever asked to serve.

> **If you were named as an alternate digital executor,** you would be asked to serve only if the first-choice digital executor is unable or unwilling to do so. The guidance below still applies, and a conversation with the family now is just as valuable.

What is a digital executor?

A digital executor manages a person's online life after they pass away. It is a relatively new role, and it has become more important as so much of our financial and personal lives now lives online. Every arrangement is different, but the role generally includes:

- Distributing digital assets such as photos, documents, music, domain names, and cryptocurrency to the people named in the will
- Closing, memorializing, or transferring email, social media, and other online accounts
- Canceling subscriptions and recurring charges
- Working with the estate's executor, since digital accounts often hold information about financial assets and bills

How does access actually work?

Most states have adopted a version of the Revised Uniform Fiduciary Access to Digital Assets Act, which gives fiduciaries a legal path to request access to a person's online accounts. Access still depends heavily on each company's policies and on any settings the account holder chose. Several major platforms now allow users to name a legacy contact or inactive account manager in advance, and those choices usually carry the most weight.

For security reasons, passwords should never be written into a will, which becomes a public record in probate. A password manager with an emergency access feature is a far safer approach.

Do I have to serve as digital executor?

No. Being nominated does not obligate you to serve. When the time comes, you can decide whether to accept the responsibility. If you decline, an alternate named in the will may step in. If no alternate is available, the court may appoint someone. Even after you accept, you can generally resign later.

What should I do now?

A short conversation now can save a great deal of frustration later. A few topics worth covering:

- **An inventory of accounts.** Email, social media, cloud storage, online banking, and any digital currency.
- **Their wishes for each.** Which accounts should be closed, memorialized, preserved, or passed on.
- **Access tools already in place.** Legacy contact settings, a password manager, and where any recovery information is kept.
- **Where the will is stored,** and who the executor of the rest of the estate will be.

Let's plan for the next generation together

Helping families prepare for what comes next, across generations, is at the heart of our work. Whether you would like to talk through what this role could mean for you or you are ready to put your own plan in order, we would be glad to help.

Call 541-228-9924 **Email** nate@nwadvisory.com
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