Digital Footprint Transition Checklist

Purpose: This document provides a structured checklist with detailed step-by-step guidance for preparing the transition of your digital footprint, including digital assets, financial access, cloud storage, and social media management, to a trusted family member or designated digital executor.

Instructions: Use this checklist as a working document. Initial and date each completed item. Review annually or after major life changes.

1. Designate a Digital Executor or Trusted Contact

- ☐ Check When Completed

How To Complete This Item:

a. Select a trusted family member or advisor who is responsible, organized, and comfortable with technology.

b. Discuss your expectations and confirm their willingness to serve in this role.

c. Consult an estate planning attorney to formally name this person in your will or trust as your Digital Executor (if applicable in your state).

d. Document their full legal name, phone number, and email address in this file.

2. Create a Master Inventory of Digital Assets

- ☐ Check When Completed

How To Complete This Item:

a. List all online accounts including financial, email, utilities, subscription services, e-commerce, and cloud storage.

b. Include account names, URLs, and the purpose of each account.

c. Do NOT write passwords directly in this document. Instead reference where credentials are securely stored (e.g., password manager, digital footprint workbook).

d. Organize accounts by category: Financial, Personal, Social Media, Utilities, Subscriptions and Business if applicable.

3. Implement a Secure Password Management System

- ☐ Check When Completed

How To Complete This Item:

a. Use a reputable password manager(or document stored safely) to securely store login credentials.

b. Enable multi-factor authentication (MFA) for all critical accounts.

c. Store the master password to a password manager in a sealed envelope or secure legal document location.

d. Provide instructions for accessing the password manager upon incapacity or death.

4. Document Financial Digital Assets

- ☐ Check When Completed

How To Complete This Item:

a. List online banking, investment platforms, retirement accounts, and cryptocurrency wallets.

b. Record account institution names and customer service numbers.

c. Indicate beneficiary designations and confirm they are current.

d. Store private keys for cryptocurrency in a secure offline method (e.g., hardware wallet) and document access instructions.

5. Social Media Account Management Plan

- ☐ Check When Completed

How To Complete This Item:

a. List all social media platforms you use (e.g., Facebook, Instagram, LinkedIn, X, YouTube, TikTok).

b. For each platform, decide whether you want the account memorialized, deleted, or managed.

c. Activate legacy contact settings where available.

d. Write a brief statement of instructions describing your wishes for public announcements or content preservation.

6. Email Account Control

- ☐ Check When Completed

How To Complete This Item:

a. Identify your primary and secondary email accounts.

b. Ensure account recovery options are updated (phone number, backup email).

c. Provide instructions for notifying contacts and closing or maintaining the account.

d. Archive important communications in a secure location.

7. Cloud Storage & Digital Files Organization

- ☐ Check When Completed

How To Complete This Item:

a. Organize files into clearly labeled folders (Financial, Legal, Photos, Business, Personal).

b. Remove redundant or unnecessary files.

c. Back up critical files to an external hard drive or secondary cloud provider.

d. Document where backups are stored and how to access them.

8. Domain Names & Website Ownership

- ☐ Check When Completed

How To Complete This Item:

a. List all owned domain names and registrar information.

b. Document hosting provider details and renewal dates.

c. Provide transfer instructions for business continuity.

d. Ensure auto-renewal is enabled where appropriate.

9. Subscription & Recurring Payment Audit

- ☐ Check When Completed

How To Complete This Item:

a. Review credit card and bank statements for recurring digital subscriptions.

b. Create a list of services that should be canceled or maintained.

c. Document billing cycles and cancellation procedures.

d. Provide login access instructions via password manager.

10. Data Privacy & Account Deletion Instructions

- ☐ Check When Completed

How To Complete This Item:

a. Identify accounts that should be permanently deleted.

b. Research each platform's deletion process in advance.

c. Provide written consent if required for data removal.

d. Document steps required to download important data before deletion.

11. Business Digital Assets (If Applicable)

- ☐ Check When Completed

How To Complete This Item:

a. List business banking, payment processors, CRM systems, and accounting software.

b. Document administrator access roles and permissions.

c. Create a continuity plan for clients and vendors.

d. Store licensing keys and vendor contracts securely.

12. Annual Review & Update Log

- ☐ Check When Completed

How To Complete This Item:

a. Schedule an annual review date.

b. Update account inventory and beneficiary designations.

c. Confirm trusted contact information is current.

d. Document the date of each review and any changes made.

Signatures & Acknowledgment

Owner Signature: ___________________________ Date: ___________

Digital Executor Signature: ___________________________ Date: ___________