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DIGITAL EXECUTOR ASSET INVENTORY

Complete Guide to Documenting,
Accessing &
Preserving Cryptocurrency, Cloud
Storage, Social Media & Digital
Legacies

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Cryptocurrency, Cloud Storage, Social Media & Digital Legacies

WHAT THIS WORKBOOK DOES:

Digital assets now comprise significant estate value, but traditional executor training doesn't address cryptocurrency wallets, password managers, cloud storage, social media accounts, NFTs, or online businesses. This workbook helps executors systematically inventory, access, and preserve digital assets before they're permanently lost.

WHO SHOULD USE THIS:

Executors discovering digital assets during estate administration
Anyone planning their own digital estate
Estate attorneys working with clients on digital asset planning
Families trying to access deceased loved one's accounts

HOW TO USE THIS WORKBOOK:

1. Complete the Digital Asset Inventory for everything the decedent owned
2. Use platform-specific access guides to request official access
3. Document all access attempts and outcomes
4. Preserve digital legacies before accounts are deleted
5. Retain this completed workbook with estate records

CRITICAL UNDERSTANDING:

Legal authority as executor doesn't guarantee technical access. RUFADAA gives you the right to access digital assets, but you still need actual credentials. This workbook helps you navigate both the legal process and the technical reality.

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DIGITAL ASSET INVENTORY

Use this comprehensive checklist to identify all digital assets. Check every category that applies and document known information.

CRYPTOCURRENCY & BLOCKCHAIN ASSETS

Check	Asset Type	Known Information	Estimated Value
	Bitcoin (BTC)		
	Ethereum (ETH)		
	Other cryptocurrency		
	NFTs / digital collectibles		
	Hardware wallet (Ledger, Trezor)		
	Exchange accounts (Coinbase, etc)		

CRITICAL NOTE:

Cryptocurrency without seed phrases or private keys is permanently unrecoverable. Hire cryptocurrency recovery specialists immediately if holdings are substantial. Do not attempt to guess passwords or brute-force wallets.

CLOUD STORAGE & PASSWORD MANAGERS

CLOUD STORAGE ACCOUNTS

Check	Service	Email/Username	Access Status	Data Backed Up?
	Google Drive / Photos			
	Apple iCloud			
	Dropbox			
	Microsoft OneDrive			
	Other:			

PASSWORD MANAGERS

Check	Service	Email/Username	Emergency Access Setup?
	1Password		
	LastPass		
	Bitwarden		
	Dashlane		
	Other:		

SOCIAL MEDIA ACCOUNTS

Check	Platform	Username/Handle	Access Status	Action Requested
	Facebook			
	Instagram			
	Twitter / X			
	LinkedIn			
	TikTok			
	YouTube			
	Other:			

PLATFORM ACCESS POLICIES:

Facebook/Instagram: Request memorialization or deletion through Meta deceased user policies

Twitter/X: Submit deceased user report with death certificate

LinkedIn: Accounts automatically deleted upon notification of death

TikTok: Report deceased user through support system

LEGAL WARNING:

Do not access accounts using found credentials. This violates the Computer Fraud and Abuse Act (federal law) and platform terms of service. Use official deceased user procedures even though they are slower.

ONLINE BUSINESSES & REVENUE ASSETS

Check	Asset Type	Description	Monthly Revenue	Status
	Domain names			
	Website/blog			
	YouTube channel			
	Online course/product			
	E-commerce store			
	SaaS/software			
	Affiliate sites			

IMMEDIATE ACTION REQUIRED:

Online businesses die quickly without maintenance. Within 30 days:

1. Renew all domain registrations and hosting
2. Maintain payment processors and merchant accounts
3. Update email addresses to prevent service cancellations
4. Consider hiring someone to maintain operations during probate
5. Document all revenue sources and expenses for estate accounting

DIGITAL ASSET ACCESS TRACKER

Document every access attempt and outcome. This becomes your liability protection if questioned later.

Date	Asset/Account	Action Taken	Outcome	Next Steps

DIGITAL LEGACY PRESERVATION CHECKLIST

BEFORE ACCOUNTS ARE DELETED:

- Downloaded all photos from cloud storage
- Saved important emails and messages
- Exported social media content family wants preserved
- Documented cryptocurrency holdings and wallet locations
- Transferred domain names to permanent ownership
- Backed up business data and customer information
- Saved NFT ownership records and marketplace screenshots

PROFESSIONAL HELP NEEDED:

- Cryptocurrency recovery specialist (if holdings over \$10,000)
- Digital forensics firm (for locked devices with valuable data)
- Probate attorney with RUFADAA experience
- CPA for cryptocurrency tax reporting
- Business valuation specialist (for online businesses)

MEMORIAL MERITS MemorialMerits.com

*Complete digital executor guide with state-by-state RUFADAA laws,
platform access procedures, and digital estate planning resources*

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