




What is a Digital Estate?



Hardware



Digital Accounts




Digital Services

August 15, 2022 Genealogy Club 6


6

Your Digital Estate



Typically have 130 digital accounts!

- Monetary value.
- Personal/Privacy value.
- Sentimental value.
- Historical value



Why is this important?

August 15, 2022 Genealogy Club 7

7

What happens when you die?

- Without a plan, your digital online presence:
 - Continue to exist
 - Unable to be accessed, modified, deleted
 - Management Company terminates account and all data is lost.

August 15, 2022 Genealogy Club 8

8

Your Digital Estate

Your goals

- Choose the disposition of the asset
- Prevent Identity Theft
- Maintain personal Privacy
- Provide Access by Executor/Trustee

August 15, 2022 Genealogy Club 9


9

The Law


- Revised Uniform Fiduciary Access to Digital Assets Act, January 1, 2017 (California Probate Code § 870-884)
- Establishes a means to designate a digital executor for your digital assets.
- Discuss with your Estate Attorney.

August 15, 2022 Genealogy Club 10

10



Now you have something to think about!



Let's plan a response.

August 15, 2022 Genealogy Club 11

11

Your Digital Estate

First
create an inventory of your digital assets.

- Digital Devices
- Digital Accounts
- Digital Services

12

Passwords

- The KEY to protecting your data.
- Typical: 130 accounts requiring
 - a login,
 - password,
 - code,
 - two factor authentication,
 - security details.

13

Passwords

- Moving toward biometrics
- How do you store passwords?
- Use a password manager.
- New Technology this fall: PASKEY

14

Your Digital Devices

Computer

Phone

Tablet

Watch

Camera

Flash Drives

Hard Drive

Apple TV
Roku

August 15, 2022 Genealogy Club 15

15

DIGITAL ASSET INVENTORY

Digital Devices/

Device	Brand/Model/Year	Accession/Access Code	Pin	Backup/Status

© 2018 Bruce VanPiper August 2022 1.0.0.0

August 15, 2022 Genealogy Club 16

16

Your Digital Accounts


The Big 5

- Google (Alphabet)
- Apple
- Amazon
- Microsoft
- Meta (Facebook)


August 15, 2022 Genealogy Club 17

17


Your Genealogy Accounts



Websites



Programs



Apps

August 15, 2022
Genealogy Club
18

18

DIGITAL ESTATE INVENTORY			
DIGITAL ACCOUNT EXAMPLES			
Account Type	Examples	Account Type	Examples
Email	Outlook iCloud Gmail Yahoo AOL	Banking	Chase Wells F & S Bank of America
Social Media	Facebook Instagram Twitter Pinterest LinkedIn	Cloud Storage	iCloud Google Drive Drop Box One Drive
Shipping	UPS My Choice United Mileage Plus Delta SkyMiles	Music	Apple Music Spotify Amazon Music Pandora
Shopping	Costco Shopping MYWORLD	Books/Subscription	Apple Books Kindle Amazon Kindle Comixology PlayStation
Money Management	Quicken MSN QuickBooks	Photo Sharing	Google Photos Facebook iPhoto
Banking/Investing	Personal Banking Account Investment Brokerage Account	Software Licenses	Microsoft Office Turbo Tax QuickBooks
Messaging/Mail Conferencing	Outlook Apple Message Facebook Messenger Facebook WhatsApp Signal	Travel Transportation	TripIt Expedia Hilton Marriott.com Uber/Lyft Discount Sites
Medical Records/Health/Fitness	MyChart Apple Health Anthem First Subscriptions: Weight Watchers	Video Streaming	Netflix YouTube TV Amazon Video Apple TV Hulu

© 2019 Merice Technology
August 2022
1.0.0.0

August 15, 2022
Genealogy Club
19

19

DIGITAL ESTATE INVENTORY				
Digital Account	Email/URL	Password	PIN	Encryption/Security

© 2019 Merice Technology
August 2022
1.0.0.0

August 15, 2022
Genealogy Club
20

20

Your Digital Estate

DO YOU HAVE YOUR OWN WEBSITE OR DOMAIN?

ARE YOU THE WEBMASTER FOR A GROUP OR CLUB?

August 15, 2022 Genealogy Club 21

21

DIGITAL ASSET INVENTORY

DIGITAL ASSET MANAGEMENT DOMAIN REGISTRATION

DOMAIN NAME		
REGISTER FOR DOMAIN NAME		
CONTACT NAME/POSITION		
EMAIL/PHONE		
PHONE		
INITIAL CONTRACT DATE	INITIAL DATE	
INITIAL REGISTRATION FEE		
LOG IN	USER NAME	PASSWORD
REGISTRY/OWNER		
ADMINISTRATOR CONTACT		
NAME		
EMAIL		
ADDRESS		
PHONE		
BILLING/RENEWAL CONTACT		
NAME		
EMAIL/PHONE		
BILLING ADDRESS		
RENEWAL FREQUENCY/DATES		
PAYMENT METHOD		

© 2010 Marcia VanHagner January 2020 L.3.15.9

August 15, 2022 Genealogy Club 22

22

DIGITAL ASSET INVENTORY

DIGITAL ASSET MANAGEMENT WEBSITE HOST

WEBSITE HOST		
CONTACT NAME/POSITION		
EMAIL/PHONE		
PHONE		
INITIAL CONTRACT DATE/FEE	INITIAL DATE	INITIAL FEE
RENEWAL/FREQUENCY DATES	RENEWAL FREQUENCY	RENEWAL DATE
LOG IN	USER NAME	PASSWORD
ORGANIZATION WEBSITE CONTACT		
NAME		
EMAIL		
ADDRESS		
PHONE		
ORGANIZATION BILLING/RENEWAL CONTACT		
NAME		
EMAIL		
BILLING ADDRESS		
PHONE		
PAYMENT METHOD		
GO TO WHOIS.COM	SEARCH FOR DOMAIN NAME. PRINT OUT DOCUMENT AND ATTACH FOR VERIFICATION.	

© 2010 Marcia VanHagner January 2020 L.3.15.9

August 15, 2022 Genealogy Club 23

23

Your Digital Estate

First
Create an inventory of your digital assets.

✓ DONE

24

Your Digital Estate

Second
Name your Digital Executor

- Can be different from your Estate Trustee
- Duties
 - Access your digital accounts on your digital devices
 - Carry out your instructions

25

Your Digital Executor

Characteristics

- Available
- Computer Savvy
- Responsible/Discreet
- Over 18 years old

Consider a fiduciary

26

Fiduciary position of trust

- Trustee of your Trust
- Conservator of the person/estate
- Executor of will
- Power of Attorney
 - Health Care
 - Finances
- www.pfac-pro.org

27

Your Digital Estate

1. ✓ Create an inventory
2. ✓ your digital Executor
3. Designate your Final Instructions

28

Your Digital Estate

Third,
Give your Final Instructions

- Decide how each account should be handled
 - Close?
 - Delete?
 - Pass to?
 - What happens to the information?
- Write it down!

29

Digital Asset Management Executor	Digital Executor	Final Instructions

© 2016 Maria Spangher August 2022 3.9.18.4

30

Your Digital Estate

- ✓ Create an inventory
- ✓ your digital Executor
- ✓ Designate your Final Instructions

Make it legal

August 15, 2022 Genealogy Club

31

Your Digital Estate

Fourth

Make it legal!

- Discuss with your Estate Attorney
 - Fill out your inventory first!
- Ask about the status of the law
- Option: Assignment and transfer schedule in your Estate plan.

August 15, 2022 Genealogy Club

32

Your Digital Estate

What to do with the Inventory Documents?

- Keep in a safe place...where do you keep the information now?
- Incorporate into your Trust
- Do NOT incorporate into your Will

33

Your Digital Estate

- ✓ First, do an inventory
- ✓ Second, choose a digital executor
- ✓ Third, write down your instructions
- ✓ Fourth, make it legal
- ✓ Fifth, keep the information safe, but accessible.

Sixth, Keep it current!

34

Your Digital Estate

Questions?

Contact:
mmvanwagner@gmail.com

35
