

Your Digital Estate

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Getting Your Stuff Together
March 15, 2024

What is a Digital Estate?



Hardware



Digital
Accounts



Digital
Services

Your Digital Estate

Your Digital Estate has Value



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

What happens when you die?

Without a plan, your digital presence:

- Continues to exist
- Unable to be accessed, modified, deleted
- Management Company terminates account and all data is lost.

Your Digital Estate

Your Plan

- Choose the disposition of the asset
- Prevent Identity Theft
- Maintain personal Privacy
- Provide Access to your agent

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.

Durable
Digital
Asset
POA

- Name your agent to access accounts
- Keep an inventory of your accounts.

Passwords

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

Passwords

- Moving toward biometrics
- How do you store passwords?
- Use a password manager.
- 2 factor authentication
- PASSKEY

Passwords

Formula

- Capital letter
- Lower case letter
- Number
- Symbol
- At least 8 characters long

Website: Amazon

- Cap Letter: A
- Lower case: m
- Core Password: charliebrown
- Number: 7
- Symbol: #

Password: Amcharliebrown7#

Your Digital Estate

First

create an inventory of your digital assets.

- Digital Devices
- Digital Accounts
- Digital Services

Your Digital Estate

First

Create an inventory of your digital assets.

✓DONE

Your Digital Estate

Second

Name your Digital Executor

- Duties
 - Access your digital accounts on your digital devices
 - Carry out your instructions

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

Your
Digital
Estate

- ✓ Create an inventory
 - ✓ Name your digital Executor
 - ✓ Define your Final Instructions
- Make it legal

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Your
Digital
Estate

Fourth

Make it legal!

- Discuss with your Estate Attorney
- Ask about the status of the law
- Durable POA

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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

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Your Digital Estate

What to do with The Genealogy Information?

- 3-2-1

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Roll over image to zoom in

Seagate Portable 2TB External Hard Drive HDD — USB 3.0 for PC, Mac, PlayStation, & Xbox -1-Year Rescue Service (STGX2000400)

Visit the Seagate Store

Platform: Windows 8, Windows 10, Mac OS X, Windows 7

4.7 244,196 ratings

Amazon's Choice in External Hard Drives by Seagate

100+ bought in past month

\$69.99

~~\$11.67~~ (no 65 mo). Select from 3 plans

Prime Same-Day

FREE Returns

May be available at a lower price from other sellers, potentially without free Prime shipping.

Size: 2TB

1TB	2TB	4TB	5TB	6TB	8TB
10TB	12TB	14TB	16TB	18TB	20TB

Style: Portable

Portable | PC Hub | Desktop

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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!

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Your
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Estate

Questions?

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