



Digital Estate Checklist

A practical guide to managing your digital life as part of your estate plan

1. Digital Account Inventory

- Email accounts
- Online banking & investment platforms
- Superannuation portals
- Social media accounts
- Cloud storage (photos, documents)
- Subscriptions & memberships
- Cryptocurrency & digital wallets
- Websites, domains or online businesses
- Loyalty programs & reward points

2. Access & Security

- Password manager in place
- Secure storage location documented
- Devices listed (phone, laptop, tablet)
- Two-factor authentication noted

3. Instructions for Each Asset

- Keep or transfer to family
- Close or delete
- Memorialise (social media)
- Sell or manage ongoing

4. Legal Authority

- Executor able to manage digital assets
- Digital authority included in Will
- Enduring Power of Attorney covers digital access

5. Review & Maintenance

- Checklist reviewed annually
- Updated after major life events
- Aligned with current estate plan

Prepared by Priority1 Wealth Management Group

This checklist is general in nature and does not replace legal or financial advice.