



Help Clients Safeguard Digital Assets

It's not just photos they could be losing.

We live a lot of our lives in the online world, yet digital property is one of the most overlooked aspects of estate planning. **Digital property can include:**

Financial Assets

- Documents
- Bank + brokerage accounts
- Credit card accounts + rewards
- Cryptocurrency

Personal Assets

- Email + social media accounts
- Website domains
- Copyrighted works
- Online storage (e.g., photos)

A digital assets plan ensures your clients' family members or estate can access crucial data at an already stressful time. **Here's how to help them get started:**



MAKE A LIST

Encourage clients to inventory their digital assets and include details about how to access each one.



SECURE THE INFORMATION

Clients should use a password manager to store their account info or leave a list with their lawyer or in a safe deposit box.



DOCUMENT WISHES

Urge clients to decide and clearly document what they want to share with family and what should be permanently deleted.



ASSIGN A SAFEKEEPER

Clients should choose a digital executor and make this authorization legal by naming that person in their will.



Advise your clients not to put passwords or digital access information in a will because it becomes a public document when it goes to probate.*

* Arden Trust Company does not provide legal advice. Please consult a legal professional for advice specific to your circumstances.

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