

The Digital Legacy Checklist

A short working document: every category of digital asset, what your executors need for each, and the questions to ask your platforms now.

Free checklist · September 2026 · Print and keep with your will

About this guide. iProbate provides will-writing, estate-planning and estate-administration services. We are not a firm of solicitors and do not carry out reserved legal activities under the Legal Services Act 2007. This guide is general information about the law of England and Wales as at September 2026, not advice on your circumstances. Succession and tax law differ by jurisdiction and change over time. Take advice before you act.

Write down what exists and who to approach. Never write down a password, a PIN, a recovery phrase or a private key. An inventory that contains a secret is a shopping list for whoever finds it.

The one rule that governs this whole document.

1. What to record, category by category

Category	Examples	What executors need
Self-custodied crypto	Hardware wallet, software wallet, multi-sig	That it exists, roughly what it holds, and where the recovery instruction is kept
Custodial crypto	Exchange accounts, staking platforms, custodians	Venue, registered email, country of incorporation
Tokenised & NFT	Collections, tokenised funds, on-chain domains	Chain and wallet address. Valuation is the hardest part
Financial & fintech	Neobanks, brokerages, e-money wallets	Providers with no branch and no paper statements are the ones missed
Domains & online business	Registrars, hosting, storefronts, channels	Renewal dates - an income-producing domain can lapse mid-administration
Intellectual property	Published works, royalties, licensed images, code	Copyright normally outlives you and forms part of the estate

Sentimental	Photo and video libraries, correspondence, cloud drives	Rarely worth money; most often what families actually lose
Email	Primary and recovery addresses	Usually the master key to everything above. Deal with it first

2. Questions to ask your platforms now

- Does this provider have a legacy contact or inactive-account setting? Several major platforms do, and they only work if configured in advance.
- What does the provider require from an executor – a death certificate alone, or a grant of representation?
- Is the account transferable at all, or does it end at death under the terms of service? For many platforms an account is a personal licence, not an asset.
- Where is the provider incorporated? It determines whose courts and whose process apply.
- Is two-factor authentication tied to a phone number that will be cancelled? This is the single most common practical lock-out.

3. Choosing an access route

Route	How it fails
Sealed instruction with a trusted person	Depends entirely on one person's integrity and survival
Split secret, threshold recovery	Shares lost, holders untraceable, or a family that will not cooperate
Multi-signature wallet	Co-signers must still be findable and competent years later
Specialist inheritance service	Provider failure; and a timer can fire while you are alive

None of these makes anyone the legal owner. They move control, not title. Whatever you choose, the will still has to say who inherits, and the release condition should match what the will says.

4. The one-page action list

- List every account and asset – venue, type, rough value band. No credentials
- Deal with the primary email account first; it unlocks everything else
- Configure legacy contacts and inactive-account settings where offered
- Choose one access route and write down where the instruction is held
- Check no recovery phrase is written in your will



- Confirm your will has a digital-asset clause and extended executor powers
- Tell your executors the inventory exists and where it is kept
- Start a base-cost record for anything that may be sold – dates and prices
- Diarise a review: annually, and whenever you open or close an account

Build your inventory free

iprobate.io/tools/digital-asset-inventory – a browser-only tool that produces a printable schedule. It performs no network requests: nothing you type is transmitted to us or to anyone else, and we cannot recover it for you. That is the design.

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