

# FinalVault - Digital Inheritance Protection

Helping UK families secure their digital legacy. Store documents, passwords & assets safely so loved ones can access everything when needed.

- Bank-grade security
- Complete organisation
- Family protection

FinalVault 

## Digital Estate Planning Checklist

### 15 Things Your UK Family Needs to Know

*A comprehensive guide to protecting your digital legacy*

#### How to Use This Checklist

Print this checklist and work through each section systematically. Share the completed information with your trusted family members or executor. Update annually or when you make significant changes to your digital life.

**! Security Note:** Never store passwords directly in this document. Use a password manager and share the master password securely with your designated person.

#### 1. Password Manager Setup

- Set up a password manager** (1Password, Bitwarden, LastPass)
- Store all important passwords** in the password manager
- Create emergency access** for your spouse/partner
- Write down master password** and store in secure location
- Share location of master password** with trusted family member

**Notes:** \_\_\_\_\_

#### 2. Email Accounts

- List all email addresses** you actively use

- Set up legacy contacts** (Gmail, Outlook allow this)
- Document which accounts** are linked to important services
- Enable two-factor authentication** with backup codes
- Store backup codes** in secure location

**Primary Email:** \_\_\_\_\_

**Secondary Emails:** \_\_\_\_\_

### 3. Social Media Accounts

- Facebook:** Set up legacy contact or memorialisation preferences
- Instagram:** Link to Facebook settings or document preferences
- LinkedIn:** Document whether to keep active or remove
- Twitter/X:** Document account preferences
- Other platforms:** \_\_\_\_\_

**Legacy Contact:** \_\_\_\_\_

### 4. Financial Accounts

- Online banking** login details (stored in password manager)
- Investment platforms** (Hargreaves Lansdown, AJ Bell, etc.)
- Pension portals** and account numbers
- PayPal and payment apps** (Revolut, Monzo, etc.)
- Store account numbers** and contact information separately

**Main Bank:** \_\_\_\_\_

**Investment Accounts:** \_\_\_\_\_

### 5. Digital Documents & Cloud Storage

- Google Drive:** Share access with family member
- iCloud:** Set up family sharing or legacy contact
- Dropbox:** Add family member as emergency contact
- OneDrive:** Configure family access

- Document location** of important files within each service

**Primary Storage:** \_\_\_\_\_

**Important Folders:** \_\_\_\_\_

## ✓ 6. Cryptocurrency & Digital Assets

- List all cryptocurrency exchanges** (Coinbase, Binance, etc.)
- Document wallet addresses** and recovery phrases
- Store recovery phrases** in secure physical location
- NFTs and digital collectibles** - document platforms
- Share access method** with trusted person

**Exchanges:** \_\_\_\_\_

**Wallet Types:** \_\_\_\_\_

## ✓ 7. Subscription Services

- Create a list** of all paid subscriptions
- Netflix, Amazon Prime, Spotify** - family accounts?
- News subscriptions**(Times, Guardian, etc.)
- Software subscriptions** (Adobe, Microsoft 365)
- Document billing methods** and cancellation processes

**Key Subscriptions:** \_\_\_\_\_

## ✓ 8. Digital Photos & Memories

- iPhone/iCloud photos:** Set up shared albums or legacy access
- Google Photos:** Enable partner sharing
- Physical device storage:** Document locations
- Cloud backup services:** Ensure family access
- Create photo inventory** of most important collections

**Photo Storage Locations:** \_\_\_\_\_

## ✓ 9. Work & Business Accounts

- Business email accounts** and CRM systems
- Company file storage** (SharePoint, Google Workspace)
- Professional social media** (LinkedIn business pages)
- Client communication platforms** (Slack, Teams)
- Document handover procedures** for business continuity

**Business Systems:** \_\_\_\_\_

## 10. Smart Home & IoT Devices

- Smart home hubs** (Alexa, Google Home)
- Security systems** and camera access
- Smart locks** and access codes
- Utility apps** (smart meters, heating controls)
- Document device passwords** and setup procedures

**Smart Home Accounts:** \_\_\_\_\_

## 11. Entertainment & Gaming

- Streaming services** with downloaded content
- Gaming accounts** (Steam, PlayStation, Xbox)
- Digital music libraries** (iTunes purchases)
- E-book collections** (Kindle, Audible)
- Document valuable digital purchases**

**Gaming/Entertainment:** \_\_\_\_\_

## 12. Legal & Important Documents

- Digital copies of wills** and estate documents
- Insurance policies** stored digitally
- Property documents** and mortgage information
- Vehicle documents** and insurance
- Backup important PDFs** in multiple locations

**Document Storage:** \_\_\_\_\_

### 13. Two-Factor Authentication

- List all accounts** using 2FA
- Store backup codes** securely
- Consider authenticator app** backup methods
- Document recovery processes** for each service
- Share access to backup codes** with trusted person

**2FA Apps Used:** \_\_\_\_\_

### 14. Domain Names & Websites

- Personal websites** and domain registrations
- Blog platforms** (WordPress, Medium)
- Business websites** and hosting accounts
- Email hosting services**
- Document renewal dates** and hosting details

**Websites/Domains:** \_\_\_\_\_

### 15. Emergency Contacts & Instructions

- Compile master contact list** for all services
- Write clear instructions** for accessing each account
- Designate primary contact person** for digital assets
- Store physical copies** in fireproof safe
- Schedule annual reviews** and updates

**Primary Digital Executor:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Email:** \_\_\_\_\_

 Security Best Practices

For You:

- **Use unique passwords** for every important account
- **Enable two-factor authentication** wherever possible
- **Keep software updated** on all devices
- **Regular security reviews** - at least annually

For Your Family:

- **Don't share passwords** via email or text
- **Meet in person** to transfer sensitive information
- **Use a password manager** for sharing
- **Keep backup codes** in a secure physical location

## Annual Review Checklist

- Update password manager** with new accounts
- Review and update** legacy contacts on all platforms
- Check subscription services** - cancel unused ones
- Update contact information** with family members
- Review digital asset inventory** for new acquisitions
- Test emergency access** procedures with family

**Last Updated:** \_\_\_\_\_

**Next Review Date:** \_\_\_\_\_

## Emergency Action Plan

If Something Happens to You:

1. **Immediate Priority:** Contact designated digital executor
2. **Week 1:** Secure access to critical accounts (banking, email)
3. **Week 2:** Handle time-sensitive subscriptions and services
4. **Month 1:** Full inventory and account management
5. **Ongoing:** Maintain or close accounts based on family wishes

Important UK Resources:

- **Citizens Advice:** 0800 144 8848
- **HMRC Bereavement Service:** 0300 123 1072
- **Tell Us Once Service:** [gov.uk/after-a-death](https://www.gov.uk/after-a-death)

 **Need Help?**

Setting up your digital estate plan can feel overwhelming. That's why we created **FinalVault** - to make this process simple and secure for UK families.

**Visit:** [www.finalvault.co.uk](http://www.finalvault.co.uk) **Email:** [support@finalvault.co.uk](mailto:support@finalvault.co.uk) **Phone:** 0131 381 7956

*This checklist is provided for educational purposes. For legal advice regarding your estate, consult with a qualified solicitor.*

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