



Chapman Law Can Help

Digital-asset planning works best when it is coordinated with your overall estate plan. We help clients create practical strategies for passwords, access, authority, fiduciary coordination, and the transfer or preservation of digital property.

WE CAN HELP WITH:

- ◆ Estate plans that address digital assets
- ◆ Powers of attorney and fiduciary authority
- ◆ Trust and probate coordination
- ◆ Planning for online financial accounts
- ◆ Digital inventory guidance
- ◆ Family questions after incapacity or death

This brochure provides general educational information and is not legal advice.

 **DENVER OFFICE**
7900 E. Union Ave., Suite 1100
Denver, CO 80237
303-357-3211

 **PUEBLO OFFICE**
310 S. Victoria Ave., Suite G
Pueblo, CO 81003
719-497-9790

 www.chapmanlawpllc.com
 daniel@chapmanlawpllc.com



Why This Matters

Many of the most important parts of life are now digital. Without planning, loved ones may struggle to locate, access, preserve, or close your accounts.

-  Email and messaging
-  Online banking and financial apps
-  Social media accounts
-  Photos, videos, and cloud storage
-  Subscription services and shopping accounts
-  Cryptocurrency and wallets
-  Domain names and business tools



GOOD PLANNING HELPS

- ✓ Reduce confusion and delay
- ✓ Preserve valuable records and memories
- ✓ Make your wishes easier to follow

ESTATE
PLANNING
SERIES



What Happens to Your Digital Assets?

A practical guide to protecting your online accounts, devices, passwords, and digital memories.

From email and online banking to family photos and cryptocurrency, your digital life may hold both financial and sentimental value. Planning now can make things much easier for the people who may one day need to help.



What Counts as a Digital Asset?

Digital assets can include far more than social media. Think broadly about what you use, own, store, or control online.

 Email and messaging accounts

 Social media profiles

 Online banking, investment, and payment apps

 Cloud storage and online documents

 Photos, videos, and digital files

 Loyalty programs, subscriptions, and shopping accounts

 Websites, blogs, and domain names

 Cryptocurrency, tokens, and digital wallets

 Business logins and professional tools

REMEMBER



Some digital assets have financial value. Others have sentimental value. Many have both.



How to Prepare

- 1 Make a digital inventory.**
List your accounts, devices, and digital assets in one secure place.
- 2 Identify your key email address and important logins.**
This is often the gateway to everything else.
- 3 Use a secure password manager or another safe organizational system.**
Strong, unique passwords and good organization make all the difference.
- 4 Review provider tools such as legacy contacts or inactive account settings.**
Many services offer built-in options—use them if they fit your plan.
- 5 Coordinate your wishes with your power of attorney, trustee, and personal representative.**
Make sure the right people know what you want and where to find it.
- 6 Leave clear instructions about what should be preserved, transferred, memorialized, or closed.**
Be specific about your wishes for each important asset.



HELPFUL TOOLS



Password manager



Secure inventory list



Device list



Backup storage plan



Written instructions for fiduciaries



Important Issues to Think About



ACCESS AND AUTHORITY

Even close family members may not automatically have legal authority or practical access to your accounts.



PRIVACY AND SECURITY

Avoid writing sensitive passwords in insecure places. Planning should balance access with security.



PHOTOS, MEMORIES, AND LEGACY

Decide who should receive family photos, videos, messages, and other meaningful digital keepsakes.



CRYPTOCURRENCY AND COMPLEX ASSETS

Digital wallets and business-related accounts may require extra planning and careful records.



When should you update your plan?

- ◆ New devices or accounts
- ◆ Marriage, divorce, or death in the family
- ◆ Major changes in finances or business
- ◆ Changes to fiduciaries or beneficiaries
- ◆ Updates to your estate plan

“A clear digital-asset plan can save your loved ones time, stress, and uncertainty.”



DENVER OFFICE

7900 E. Union Ave., Suite 1100
Denver, CO 80237
303-357-3211



PUEBLO OFFICE

310 S. Victoria Ave., Suite G
Pueblo, CO 81003
719-497-9790



www.chapmanlawpllc.com



daniel@chapmanlawpllc.com