



ADVISING FAMILIES ACROSS GENERATIONS

INVENTORY FOR DIGITAL ASSETS AND DIGITAL DEVICES

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Authored by:



Digital Assets
SPECIAL INTEREST GROUP

Inventory for Digital Assets and Digital Devices

PURPOSE

A fundamental practice in estate planning and an important step in the discovery process is the creation of a physical assets and property rights inventory. With societies’ immersive participation in the internet-connected world accelerated by the COVID-19 pandemic, our client’s lives have become pervasively digital. As such, it has become a necessary step for practitioners to encourage clients to create an inventory for digital assets and digital devices, in addition to one for traditional property rights and interests. In addition, our physical lives are often intertwined with our digital lives, so also included is an inventory for digital accounts associated with underlying assets (e.g., physical assets and/or property rights and/or interests accessed online). This document, as information, is designed to set context to the kinds of digital assets and digital accounts that your organisation and clients will need to consider in estate planning, incapacity planning and ultimately in estate and trust administration.

AUDIENCE

This document is for use by individuals, estate advisors and practitioners, and their respective companies, professional associations and organisations. It is expected that practitioners and their respective firms will concurrently develop, adopt or update policies, practices and tools to address a clients’ digital assets through the various estate industry phases dependent on services provided and professional competencies. In addition, with the digital transformation underway in the estate industry, as technical innovators digitise estate business processes, this inventory was designed as a sampling of the client and advisory requirements, for those developing online solutions for estate management and the future state of integrated estate industry end-to-end business processes.

RELEVANCE TO THE PRACTITIONER ROLE

From social media and email accounts to cryptocurrency and photographs, digital assets are now an important part of people’s lives. But what happens to these assets when someone dies or is incapacitated? STEP and the Microsoft-funded Cloud Legal Project at Queen Mary University of London have collaborated on a joint research project into estate practitioner views on, and experiences with, digital assets. The aim is to understand the extent to which practitioners deal with digital assets; the risks and challenges posed by digital assets to estate planning and administration and the measures practitioners are taking to assist clients with digital assets. A survey sent to STEP members globally elicited more than 500 responses from a range of practitioners across the estate and wealth planning sectors. The results provide valuable insights into the experiences of practitioners and their clients.

Access **Digital Assets: A Call to Action, a global benchmark report by STEP and the Cloud Legal Project at Queen Mary University of London, sponsored by IQ-EQ.** www.step.org/research-reports/digital-assets-call-action

STRUCTURE

The document contains three sections with supporting appendices.

Section 1: Digital Assets Inventory / Appendix 1: Digital Assets Details

Section 2: Digital Devices Inventory / Appendix 2: Digital Devices Details

Section 3: Digital Accounts associated with Underlying Assets Inventory / Appendix 3: Digital Accounts associated with Underlying Assets Details

EDITIONS

Version	Date	Notes
1 Edition	Oct 2017	Inaugural edition released shortly after the STEP Digital Assets SIG was officially constituted and launched.
2 Edition	21 Sept 2020	Restructured and revamped to reflect COVID-19 pandemic-accelerated online usage.
3 Edition	21 April 2022	Augmented to reflect new digital assets classes and the emerging class of solutions, software, platforms and offerings accelerating the digitisation and transformation of the estate industry.

NOTICES

*Please Note:

1. The focus of this inventory is intended for personal computing (personal and home use) and not business, organisational or commercial computing.
2. Securely store account access instructions (including passwords and PINs) separate from this inventory. Individuals should discuss with their estate advisors how and when to provide fiduciaries with the necessary estate information for them to complete their duties.
3. **Password sharing** is prohibited for most online accounts. Refer to specific provider terms of service for details. Follow technology advice and service provider guidance on keeping passwords and accounts secure. Review security and privacy settings regularly for privacy and confidentiality. Review or request pre-planning functions from service providers you use.
4. When completing any estate plan seek appropriate legal, tax, technical, philanthropic, charitable, insurance, family office and other appropriate specialised advice in your jurisdiction.
5. Keep inventories current as life circumstances change and/or technology evolves.
6. As this is merely an inventory, additional supporting technical, legal, tax and other documents will be required to support the portfolio of digital assets, in addition to specialised planning documents, processes, transactions and test plans that will be required for significant digital assets (e.g., having financial or sentimental value, or required by regulatory rules or jurisdictional specific laws).
7. In a business context, additional inventory, planning and user administration steps for business continuity, succession and transition planning would be required.
8. The examples provided are not an endorsement of a specific provider, product, software, or service and are merely used to illustrate a particular type of digital asset in an associated section and have been alphabetised where possible.
9. Although inventories for the purposes of estate planning, incapacity planning and estate administration are recommended, you will want to understand the implications, assess the risks, understand your risk tolerance, plan for and mitigate the risks of creating and maintaining such a consolidated list of your estate digital assets.
10. This inventory is provided for information purposes only, to encourage and raise the awareness of the importance of digital assets in one's individual estate. Individuals, practitioners and their associated organisations are encouraged to seek appropriate professional advice in their jurisdiction to address digital assets in their estates, their portfolios and/or businesses.

How to join and engage with the STEP Digital Assets SIG

The STEP Digital Assets Special Interest Group (SIG) was established in recognition of the emerging issues related to how practitioners effectively assist clients and their fiduciaries in planning for and administering the digital assets of individuals after the individual dies or loses capacity. Both STEP members and non-members alike are welcome to join this SIG, www.step.org/sigs-join, and it is currently free to join. When reviewing this inventory, if you feel there are additional types or categories, have experiences with a specific provider or want to include specific service provider or service examples that you are seeing clients regularly use, please reach out to:

- The STEP Digital Assets SIG www.step.org/special-interest-groups/digital-assets-global-special-interest-group
- LinkedIn [STEP Digital Assets SIG](#)
- Twitter [@STEP_Digital](#)
- Reach out to a STEP Digital Asset SIG Committee Member www.step.org/committee/digital-assets-sig-steering-committee

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(e.g., physical assets and/or property rights accessed online)	
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Appendix 1 – Digital assets details

- Specific questions to identify important details about your digital assets.

Appendix 2 – Digital devices details

- Specific questions to identify important details about your digital devices.

Appendix 3 – Digital accounts associated with underlying assets inventory details

- Specific questions to identify important details about your digital accounts associated with underlying assets (e.g., physical assets and/or property rights accessed online).

SECTION 1: DIGITAL ASSETS INVENTORY

Digital Assets		Username	Additional Details (See Appendix 1)
		Note: Indicate N/A if you don't use a specific type of account	
1.1 DIGITAL ASSET INVENTORY MANAGEMENT VAULTS /ACCOUNTS (Digital Estate focused)			
<p>Inventory Management Tip – Online inventory applications and services are emerging tech solutions to manage the equivalent of a paper-based inventory system such as this one and often come with other features and functions to support the fiduciary role in estate administration. When, how and your risk tolerance for their use in your specific estate planning situation is something to discuss and assess with your estate advisors. Today, these vaults or platform-based accounts tend to have a single purpose, such as for managing one's assets during life or for estate planning or other purposes. We will see these types of solutions and platforms evolving into integrated planning and inventory applications including services that address end-to-end lifecycle needs and processes. The examples provided here are focused on digital assets vaults or inventories in the estate context (see Section 3.9 for more examples, including physical/property rights inventories).</p>			
1	Clocr		
2	Directive Communication Systems (Digital ProSurety)		
3	Easeenet		
4	Legacy Concierge (LOCKYT™)		
5	MyWishes		
6			
1.2 EMAIL PROVIDERS			
<p>Email Tip – Password sharing is prohibited for most if not all online accounts. Refer to the terms of service of a specific account and/or jurisdictional specific laws. Look for and/or ask for provider pre-planning options. For example, Google's Inactive Account Manager (search in settings or help). If you select a person other than your fiduciary as your Inactive Account Manager, let the fiduciary know.</p>			
<p>Email Tip – Reconsider the type of email account you use for your username and accessing online personal accounts as these types of accounts (e.g., work, volunteer email) may become inaccessible or governed by different rules in an estate situation.</p>			
1	Apple ID/iCloud Mail		
2	AOL Mail, Yahoo! Mail		
3	Google Gmail		
4	Microsoft Outlook/Hotmail		
5	Volunteer Email		
6	Work Email		
7	Primary Email Address		
8	Secondary Email Address		
9	Tertiary Email Address		
10	Family Email Address		

SECTION 1: DIGITAL ASSETS INVENTORY CONTINUED

Digital Assets		Username	Additional Details (See Appendix 1)
Note: Indicate N/A if you do not use a specific type of account			
1.3 SOCIAL MEDIA PLATFORMS			
Social Media Tip – Look for and/or ask for provider pre-planning options. For example, Meta’s Facebook Legacy Contact has the option to select either memorialise or delete an account (search in setting or help). If you select a person other than your fiduciary as Legacy Contact, let the fiduciary know.			
1	Discord		
2	Instagram, Instagram IGTV		
3	LinkedIn		
4	Meta, Facebook Messenger		
5	Pinterest		
6	Reddit		
7	TikTok		
8	Twitter		
9	YouTube (Google)		
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11			
12			

SECTION 1: DIGITAL ASSETS INVENTORY CONTINUED

Digital Assets		Username <i>Note: Indicate N/A if you don't use a specific type of account</i>	Additional Details (See Appendix 1)
1.4 COMMUNICATION AND COLLABORATION PLATFORMS AND SERVICES (including instant messaging/chat services often associated with a particular social media platform).			
Communication Platform Tip – If the content you create, post or share in a social media platform is important, consider downloading, backing up and providing access or copies to appropriate individuals, the fiduciary, or entities in addition to selecting platform pre-planning options.			
Communication Platform Tip – When a platform is used for with family sharing or collaboration, consider planning out roles and administrator backups for the household member who first established the services.			
1	Communication	Examples: BlueJeans, Cisco WebEx, GoToMeeting, Microsoft Teams, Reddit, Skype, Slack, TeamViewer, WeChat, WhatsApp, Telegram, Trello and Zoom.	
	Communication		
	Communication		
2	Information Sharing	Examples: Dropbox Paper, Evernote, Google Keep and NoteLedge.	
	Information Sharing		
	Information Sharing		
3	Family Organiser / Life Organiser Apps	Examples: Any.do, Calendar – Family Organizer, ChoreMonster, Cozi Family Organizer, FamilyWall, Google Calendar, Google Sheets, Hub Family Organizer, Mothershp, OurHome and Picniic.	
	Family Organiser		
	Family Organiser		
4	Co-Parenting Apps	Examples: coParenter, Co Parently, Cozi, Our Family Wizard, 2Houses and Talking Parents.	
	Co-Parenting App		
	Co-Parenting App		
5	Caregiving Apps	Examples: CareZone, Carers UK-Jointly, Caring Bridge, Caring Village, CK Life, eCare21, Lotsa Helping Hands and Medisafe.	
	Caregiving App		
	Caregiving App		
6	Age-Tech Apps	Stay tuned for the next generation of apps and tools for ageing needs and caregiving support.	
	Age-Tech App		
	Age-Tech App		

SECTION 1: DIGITAL ASSETS INVENTORY CONTINUED

Digital Assets		Username	Additional Details (See Appendix 1)
		Note: Indicate N/A if you don't use a specific type of account	
1.5 DIGITAL PHOTOS, VIDEO PROVIDERS AND SERVICES			
Digital Photo Tip – Given that photos are increasingly being stored online/on the cloud, consider backing up, family sharing or printing keepsake photos periodically.			
1	Adobe Portfolio		
2	Amazon Prime Photos		
3	Apple iCloud Photos		
4	Dropbox		
5	Flickr		
6	Google Photos		
7	IDrive		
8	Image Shack		
9	Meta (formerly Facebook)		
10	Photobucket		
11	SmugMug Pro		
12	500px		
1.6 CLOUD-BASED APPLICATIONS, PLATFORMS AND DATA STORAGE PROVIDERS			
Cloud Account Tip – With hard-drive space shrinking, you might find that you have already moved your data, including photos and documents, to a cloud-based service associated with the device hardware. If the data is important, you will want to review the terms of service regarding your fiduciary's ability to access the cloud-based storage after incapacity and/or death. Previously, many of these services have been individually focused. The platforms have already evolved into integrated ecosystem platforms (see Section 1.6).			
Cloud Account Tip – Review IT best practices on a regular basis for how to back up and secure important data and assets.			
Cloud Account Tip – Cloud and data storage providers are often set up as subscription services with automatic payments. A fiduciary will need to be aware of these accounts to make other payment arrangements if the data is to be retained or transferred.			
1	Apple iCloud		
2	Box		
3	Citrix ShareFile		
4	Dropbox		
5	Google Drive		
6	Microsoft OneDrive		
7	pCloud		
8	WeTransfer		

SECTION 1: DIGITAL ASSETS INVENTORY CONTINUED

Digital Assets		Username	Additional Details (See Appendix 1)
1.7 INTEGRATED ECOSYSTEM PLATFORMS (i.e., where email, data, social and cloud services are offered or bundled together)			
<p>Ecosystem Platform Tip – As information technology (IT) and service provider services have evolved, you might have selected a provider that allows all or some of your data, including photos and documents, to be stored together (account-wise) on a cloud-based service associated with the device hardware. If the data is important, you will want to review the terms of service regarding your fiduciary’s ability to access the cloud-based storage after incapacity and/or death.</p>			
<p>Ecosystem Platform Account Tip – Review IT best practices on a regular basis for how to back up and secure important data and assets.</p>			
<p>Ecosystem Platform Tip – Integrated ecosystem platforms, cloud and data storage providers are often set up as subscription services with automatic payments. A fiduciary will need to be aware of these accounts to make other payment arrangements if the data is to be retained or transferred.</p> <p>Review for pre-planning tools and options (e.g., Google’s Inactive Account Manager, Apples’ Legacy Contact). Understand the implication of integrated data associated with these pre-planning tools.</p>			
1	Adobe Creative Cloud	Adobe – A collection of applications, software and services for graphic design, video editing, web development and photography; including mobile and cloud access including create apps such as Adobe Pro, Photoshop, Illustrator, Premiere Pro and Adobe Express.	
	Adobe		
2	Apple	Apple – iCloud email and iCloud Drive.	
	Apple		
3	Google	Google – Google Gmail, Google Drive, You Tube, Google One Plan and Google Workspace Plan.	
	Google		
4	Microsoft	Microsoft – Microsoft Outlook, Microsoft OneDrive and Microsoft Teams.	
	Microsoft		
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SECTION 1: DIGITAL ASSETS INVENTORY CONTINUED

Digital Assets		Username	Additional Details (See Appendix 1)
		Note: Indicate N/A if you don't use a specific type of account	
1.8 HOUSEHOLD IT AND COMMUNICATION MANAGEMENT ONLINE ACCOUNTS			
Managing IT Tip – Management of IT at home often involves internet access, networks, printers and other connected devices referred to as the Internet of Things (IOT).			
Managing IT Tip – Management of your home IT may be delegated to a family member, friend or outsourced to a third-party provider. Have you provided adequate authorisation and documentation for your fiduciary to deal with this?			
1	Home Phone Provider		
2	Cell or Mobile Providers		
3	Internet and/or Cable Provider		
4	Router or Network		
5	Network or Wireless Printer		
6	Home Security Equipment		
7	IT or Outsourced Provider		
8	IOT Device 1		
9	IOT Device 2		
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19			

SECTION 1: DIGITAL ASSETS INVENTORY CONTINUED

Digital Assets		Username	Additional Details (See Appendix 1)
		Note: Indicate N/A if you don't use a specific type of account	
1.9 PASSWORD MANAGERS			
<i>Password Manager Tip</i> – Online password managers are often used to store complex passwords for each online account, including provisions for family and vault sharing. This is a challenging area as password sharing often violates provider individual terms of service and jurisdictional law. Use of a password manager does not guarantee that the fiduciary will have legal access to the appropriate information at the right time. Review terms of service, jurisdictional laws and seek appropriate advice specific to your estate situation.			
<i>Password Manager Tip</i> – Consider keeping separate password managers and/or vaults for business versus home/personal use.			
1	1 Password, Keeper		
2	Apple Keychain,		
3	Bit Warden, DashLane		
4	Google - Chrome's Password Manager		
5	Microsoft - Microsoft Edge Password Manager, Keeper and Digital Vault		
6	Last Pass, LogMeOnce		
7	NordPass, Password Boss		
8			
1.10 FUNERAL, LEGACY PRE-PLANNING ACCOUNTS, HERITAGE ACCOUNTS AND SERVICES (e.g., pre-planning options, legacy and memorialisation applications, genealogy accounts, historical record accounts).			
<i>Pre-Planning Tip</i> – Arranging a funeral is the first thought after death for your family and the fiduciary. If they are unaware of your wishes and pre-planning, they may be lost; effort and cost may be duplicated.			
1	Funeral pre-planning account		
2	Genealogy account		
3	Heritage account		
4	Historical record account		
5	Legacy or online pre-planning account		
6	Memorialisation or prepared information for the family and fiduciary		
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SECTION 1: DIGITAL ASSETS INVENTORY CONTINUED

Digital Assets		Username	Additional Details (See Appendix 1)
		Note: Indicate N/A if you don't use a specific type of account	
1.11 ONLINE ACCOUNTS AND PLATFORMS Associated with volunteer efforts for a charity/not-for-profit			
Online Account Tip – Many of us have outside interests that leverage online accounts and virtual platforms. Connect with the organisations you provide volunteer time for to ensure they have IT practices that account for back-up, recovery and dependency on volunteers.			
1	Volunteer email		
2	Volunteer platform access		
3	Digital assets you are managing on behalf of the volunteer organisation		
4	Blogs or other web platforms you have developed and/or are maintaining for others		
5			
6			
7			
8			
1.12 TRADITIONAL VIRTUAL-ONLY DIGITAL ASSETS (e.g., websites, domains associated with Web 2.0)			
Virtual Asset Tip – Managing a website, digital content or social media channels often requires several components for the website to work, depending on the architecture of the site or how content is prepared and managed. Given these types of assets and their access are typically managed by the individual user, securing the access information while meeting the future requirements of the fiduciary is a complicated area in estate planning. Seek appropriate technical, legal, tax and specialised advice that is appropriate to your situation.			
Virtual Asset Tip – Of the many considerations in preparing these type of accounts for incapacity planning, succession, and estate administration, it is important that the ownership information within the account profile is accurate and up to date.			
1	Web Domain Account (Registry)		
2	Website Hosting Account		
3	Digital Content Creation Account		
4			
5			
6			

SECTION 1: DIGITAL ASSETS INVENTORY CONTINUED

Digital Assets		Username	Additional Details (See Appendix 1)
		Note: Indicate N/A if you don't use a specific type of account	
1.13 DIGITAL ASSETS AND PLATFORMS ASSOCIATED WITH A HOBBY, ENTERTAINMENT, EDUCATION OR SMALL HOME-BASED BUSINESS			
Online Account Tip – If your home-based activities, including hobbies, have expanded into acquiring, trading, building or holding digital assets or online assets, seek technical, legal, tax and specialised advice that is appropriate to your situation.			
Online Account Tip – If your home-based activities including hobbies have expanded into a business interest, such as buying, selling, third party selling, collecting or trading services, merchandise, digital assets, or online assets; seek appropriate technical, legal, tax and specialised advice that is appropriate to your situation. Business continuity, business succession and transition planning may also be required.			
1	Gaming Accounts		
	Gaming Account		
2	Avatars and Virtual assets		
	Avatars and Virtual assets		
3	Buying, Selling or Trading Accounts	Examples: Amazon Handmade, Alibaba, Bonanza, eBay, Etsy.com, Fullbeauty, Fruugo, Hollar, Kijji, Meta Facebook Marketplace, Michaels.com, Pinterest, Shopify, Tanga, Tophatter and Zalando.	
	Buying, Selling or Trading Accounts		
4	Collector sites		

SECTION 1: DIGITAL ASSETS INVENTORY CONTINUED

Digital Assets		Username	Additional Details (See Appendix 1)
<p>1.14 BLOCKCHAIN ASSETS, CRYPTO-ASSETS including non-fungible tokens (NFTs), Metaverse Digital Assets associated with Web3 (Web 3.0, Web3)</p>			
<p>Digital Asset Tip – Blockchain assets, crypto-assets and other virtual-only digital assets of value are an emerging field. Identifying and securing these assets is complex to meet the evolving innovation in this space as well as the cyber security environments and threats.</p>			
<p>Digital Asset Tip – Given these types of Web3 assets and their access are typically decentralised and managed by the user (e.g., with a private key), securing the access information while meeting the requirements of the future requirements of the fiduciary is a complicated area in estate planning.</p>			
<p>Digital Asset Tip – It may also involve other legal considerations such as intellectual property rights. Your role as a user, creator, licensee or owner is important information to share with your advisors in estate planning. Seek appropriate technical, legal, tax and specialised advice that is appropriate to your situation.</p>			
1	Cryptocurrency#1		
2	Cryptocurrency#2		
3	Cryptocurrency#3		
4	Cryptocurrency Wallet#1		
5	Cryptocurrency Wallet#2		
6	Cryptocurrency Wallet#3		
7	Cryptocurrency Exchange#1		
8	Cryptocurrency Exchange#2		
9	Cryptocurrency Custodial Service#3		
10	Other Cryptoassets		
11	Web3 Domains		
12	NFT Token Address# 1		
13	NFT Wallet#1		
14	NFT Exchange/Marketplace#1		
15	NFT Smart Contract#1		
16	NFT Permanent address #1		
17	NFT Backup Storage #1		
18	Metaverse Assets / Property		
19	Metaverse Assets / Property		
20	Metaverse Assets / Property		

SECTION 1: DIGITAL ASSETS INVENTORY CONTINUED

Digital Assets	Username <i>Note: Indicate N/A if you don't use a specific type of account</i>	Additional Details (See Appendix 1)
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1.15 YOUR TOP-THREE MOST IMPORTANT DIGITAL ASSETS OF VALUE

Tip – Although it is recommended to keep your digital asset inventory current, this can be a daunting task. At a minimum, identify the top-three digital assets that you feel would be the biggest loss if your wishes or preferences for them were not realised by your fiduciary. These may have financial and/or sentimental value such as your digital photos, cryptocurrencies, web domain, hobby accounts, blogs or loyalty points. This information can help ensure your fiduciary safeguards your most valued digital assets. You may have more than three, in which case utilise the boxes below.

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3			

1.16 BLANK WORKSHEET FOR OTHER DIGITAL ASSETS

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2			
3			
4			
5			
6			
7			
8			

SECTION 2: DIGITAL DEVICES INVENTORY

Digital Device		Username	Location of Access Instructions: i.e., Safe Deposit Box	Additional Details (See Appendix 2)
2.1 HARDWARE (computers/tablets/smartphones)				
Hardware Tip – Details include: make, model, serial number, locations, locators for the device, applications on device, cloud back-ups and contracts/leases to support ownership.				
1	Computer			
2	Laptop			
3	Tablet/iPad			
4	Smartphone/iPhone/Mobile			
5	Storage Devices			
6	Virtual Reality (VR) headsets, Augmented Reality (AR) glasses			
7	Other Devices			
8	Other Devices			
2.2 SOFTWARE INSTALLED ON HARDWARE				
Software Tip – Details include: location of licence details, devices installed on, verification information and purchase agreements to support ownership.				
Software Tip – Highlight the software platforms used to create and/or hold content or data, here or in the applicable digital assets section. Review the terms of service for data/content transfer for incapacity and/or death.				
1	Operating System Software (e.g., Apple IOS, Windows, Linux, Chrome).			
2				
3				
4				
5				
6				
7				
2.3 FILE STORAGE DEVICES INCLUDING BACKUP DEVICES				
File Storage Tip – Details include: make, model and capacity of storage device and contracts/purchase agreements to support ownership.				
1	External Hard Drive			
2	USB or Flash Drives			
3	Cryptoassets Hard Wallets			
4	Other Devices			
5	Other Media			

SECTION 3: DIGITAL ACCOUNTS INVENTORY

Digital Account <i>Associated with an Underlying Asset</i>	Username Note: <i>Indicate N/A if you don't use a specific type of account</i>	Additional Details (See Appendix 3)
3.1 ESTATE PLANNING, INCAPACITY PLANNING AND ESTATE ADMINISTRATION PLATFORMS (including emerging estate tech solutions, estate digital assets vaults, property rights and interests inventories, software, platforms and offerings)		
Estate Ecosystem Platforms Tip – <i>Integrated ‘estate ecosystem’ platforms, cloud and data storage providers are often set up as subscription services with automatic payments. A fiduciary will need to be aware of these accounts to make other payment arrangements if the data is to be retained or transferred and may need to provide documentation supporting their role for access.</i>		
Estate Ecosystem Platforms Tip – <i>Your risk tolerance for when and how to use kinds of solutions is something to discuss and assess with your estate advisors. Today, these vaults or platform-based accounts tend to have a single purpose, such as for managing one’s assets during life, estate planning, taxes or other purposes. We will see these types of solutions and platforms evolve into integrate planning and inventory applications, including services that address end to end lifecycle needs and processes (see Section 1.9 for digital asset vault examples).</i>		
Emerging Estate Tech Entrepreneurial Examples: <i>AccounTrust, CanadaHelps, ClearEstate, Epiloguewills.com, Erasure, Erin Research, Estateably, eState Planner, Estatebox, Estatesearch, Everplans, Eversafe, ExecutorDepot.com, ExecutorProtector, Farewill, International Probate Genealogists, LegalWills Group, NoticeConnect / Do Process, ReadyWhen, Safewill, Settld, Settify, SideDrawer, Trust & Will, Quick Estate and Willful.</i>		
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SECTION 3: DIGITAL ACCOUNTS INVENTORY

Digital Account <i>Associated with an Underlying Asset</i>	Username Note: <i>Indicate N/A if you don't use a specific type of account</i>	Additional Details (See Appendix 3)
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3.2 ONLINE ACCOUNTS PROVIDING ACCESS TO UNDERLYING FINANCIAL ASSETS OR INSURANCE

Examples: bank accounts, financial institution accounts, insurance policies and/or accounts, financial or wealth planning accounts, securities trading accounts, commodity accounts, employee/ private /government pensions and investment accounts.

Online Account Tip – Password sharing is prohibited for most if not all online accounts. Refer to the terms of service and/or jurisdictional specific laws. Contact each institution to determine if any advance planning or registration is available, such as registering the fiduciary or providing separate secure and compliant access. Ask what information can be shared in advance with the fiduciary.

Online Account Tip – Keep detailed information in this inventory to a minimum to protect confidentiality and privacy of account holdings. No need to provide account value. Simply note the institution name, contact person, web link, physical address of institution and type of account.

Online Account Tip – If you have gone online to track tax information such as the purchase price or cost base of an asset, you might want to let your fiduciary know where to get this information and/or your tax advisor.

1	Bank		
2	Bank		
3	Financial Institution		
4	Financial Institution		
5	Insurance Policy		
6	Insurance Policy		
7	Employee Insurance		
8	Employee or Private Pension		
9	Government Pension		
10	Investment Account		
11	Securities Trading Account		
12	Financial Planning or Wealth Management Account		

SECTION 3: DIGITAL ACCOUNTS INVENTORY CONTINUED

Digital Account <i>Associated with an Underlying Asset</i>	Username Note: <i>Indicate N/A if you don't use a specific type of account</i>	Additional Details (See Appendix 3)
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3.3 ONLINE ACCOUNTS PROVIDING ACCESS TO UNDERLYING DEBT AND LIABILITIES (e.g., credit cards, debt instruments, loans and mortgages).

Online Account Tip – Keep detailed information in this inventory, to a minimum to protect confidentiality and privacy of account holdings. Simply note the institution name, physical address, weblink, contact person and type of debt. Identify if your liability account or debt instrument has insurance coverage for incapacity and/or death and where to find this additional information.

1	Visa		
2	Mastercard		
3	American Express		
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3.4 ONLINE ACCOUNTS PROVIDING ACCESS TO UNDERLYING GOVERNMENT, PUBLIC OR PRIVATE SERVICES AND PROGRAMMES (e.g., health services, administrative services, insurance, taxes, property, pensions, registries, registrations).

Online Account Tip – With little paper trail in today's home office, given online access to services and receive statements, it will be difficult for the fiduciary to know what government agencies, programmes or private services you deal with and/or are entitled to. Do you deal with multiple agencies or various levels of government for programmes and services?

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SECTION 3: DIGITAL ACCOUNTS INVENTORY CONTINUED

Digital Account <i>Associated with an Underlying Asset</i>		Username Note: Indicate N/A if you don't use a specific type of account	Additional Details (See Appendix 3)
3.5 ONLINE ACCOUNTS PROVIDING ACCESS TO ONLINE OR THIRD-PARTY PAYMENT PROVIDERS AND SERVICES			
Online Account Tip – Keep detailed information in this inventory to a minimum to protect confidentiality and privacy of account holdings. Simply note institution name, physical address, web link and type of payment provider. Reach out to the payment provider to determine if there are pre-planning options for legally identified individuals to access and/or what documentation the fiduciary will need to provide on incapacity and/or death.			
1	Apple Pay		
2	Google Pay		
3	Cash App		
4	PayPal		
5	MetaPay		
6	Venmo		
7	WorldRemit		
8	Zelle		
3.6 ONLINE ENTERTAINMENT, CONTENT SUBSCRIPTION SERVICES AND ACCOUNTS (e.g., music, eBooks, streaming services, gaming accounts, casino/betting accounts, video services).			
Online Account Tip – With subscription services often set up with automatic payments, a fiduciary will need to be aware of these accounts to close them down to reduce expenses to the estate.			
1	Streaming Service	<i>Examples: Disney, Netflix, Spotify, Acorn TV</i>	
	Streaming Service		
	Streaming Service		
2	Gaming Accounts	<i>Examples: Animal Crossing, Counter Strike: Global Offensive, Disney Infinity, Dota 2/ League of Legends, Fortnite, Grand Theft Auto, Halo Infinite, LEGO Worlds, Minecraft, Team Fortress 2, War Thunder, World of Tanks. Many of these gaming platforms have evolved to online multiplayer environments such as massively multiplayer online role-playing games (MMORPG).</i>	
	Gaming Account		
	Gaming Account		
	Gaming Account		
3	Avatars and Virtual Assets Associated With Gaming Accounts		

SECTION 3: DIGITAL ACCOUNTS INVENTORY CONTINUED

Digital Account <i>Associated with an Underlying Asset</i>	Username Note: <i>Indicate N/A if you don't use a specific type of account</i>	Additional Details (See Appendix 3)
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3.7 ONLINE SHOPPING, MERCHANT, AND TRAVEL ACCOUNTS

Online Account Tip – Delete all online accounts you no longer use to reduce your digital and personal information footprint.

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3.8 LOYALTY, REWARD AND FREQUENT FLYER ACCOUNTS

Reward Tip – If you have accumulated rewards or points, review the terms of service for expiry information as well as conditions and restrictions related to transferring to family members or others upon incapacity and/or death.

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SECTION 3: DIGITAL ACCOUNTS INVENTORY CONTINUED

Digital Account <i>Associated with an Underlying Asset</i>		Username Note: <i>Indicate N/A if you don't use a specific type of account</i>	Additional Details (See Appendix 3)
3.9 ONLINE HOUSEHOLD OR PROPERTY MANAGEMENT ACCOUNTS			
Online Account Tip – Many of the services you procure to support your household may now be managed online. Without a paper trail, it will be difficult for your fiduciary to determine what you use. If you occupy secondary properties, you may want to complete a separate page for the additional location.			
Online Account Tip – If you have rented a storage locker, safety deposit box, lock box or use other property holding services, you might want to add them to the list so the fiduciary can retrieve the contents when required.			
Online Account Tip – Have you added your fiduciary to your home security system and/or advised the provider of their name and role, and updated what permissions or tasks they are authorised to perform?			
1	Utilities		
2	Heat / Air Conditioning Account		
3	Hydro		
4	Home Support Service		
5	Yard Maintenance		
6	Home Security System/Alarm Service Provider		
7	Postal and/or Delivery Service		
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APPENDIX 1: DIGITAL ASSETS DETAILS

Digital Asset	Questions to help you complete the Inventory
1.1 EMAIL PROVIDERS	
<ul style="list-style-type: none"> • Which email account(s) do you use most often? Are these free personal accounts or paid subscription services? Are these employer, family or business accounts? • What is the website address you use to access the email account? What devices and apps do you use to access this email account? • Email usage: Do you have more than one email account? Is the email account provided by an internet service provider, cell service provider or cable TV account? Is the email account provided by your place of employment, volunteer association, DIY web domain hosted by yourself or a family-hosted web domain? If you use an email account that is linked to another service account (like cable TV), list that account with your email information. • Will an email account persist after the hosted or managed service is shut down? • Will an email account persist after incapacity and/or death (review terms of service or other provider agreements)? • Account Management: Which email account(s) do you use for username/password recovery or reset? Does the email account have security questions associated with it? Does it require two-step authentication? Is the security code sent via email, text or third-party authenticator service? Do you regularly review your account security and privacy settings to be cyber secure? This question applies to every online account. • Fiduciary access: If available, have you used service provider pre-planning options? Are you relying on a fiduciary’s access to your email to transfer information about your estate? Have you considered other methods to share estate information, as your email may be inaccessible due to jurisdictional laws or other factors? 	
1.2 SOCIAL MEDIA PLATFORMS	
<ul style="list-style-type: none"> • Is your screen name or username different from your legal name? Add screen name or username or short names for social media sites that are different from your legal name. • Do you generate revenue or receive royalties from any social media platforms or services? • Have you given specific instructions on how you would like your social media site memorialised or shutdown? • Are any of these social media sites connected with your employment? • Account management: Do you regularly review your account security and privacy settings to be cyber secure? What are the privacy settings on the accounts (e.g., is your profile open to the world, a selected community or family/friends)? Review if privacy settings can be changed upon incapacity and/or death, if that is important to you. • Fiduciary access: If available, have you used service provider available pre-planning options? If the content on a social media platform (e.g., photos) is important to you, have you used provider functions to download content regularly? Do you regularly back up content and make it accessible to others, if that is your preference? 	
1.3 COMMUNICATION AND COLLABORATION PLATFORMS AND SERVICES	
<ul style="list-style-type: none"> • Is the screen name, username, short name, or character name different from your legal name? Add screen name, username or short name for collaboration sites and platforms that are different from your legal name. • If the content you create is important to you, have you referred to the terms of service for the platform on whether content will be accessible to your fiduciary or estate after incapacity or death. • Are there associated IM/chat services used to generate revenue or receive royalties, i.e., followers / advertising revenue? 	

APPENDIX 1: DIGITAL ASSETS DETAILS CONTINUED

Digital Asset	Questions to help you complete the Inventory
1.4 DIGITAL PHOTOS, VIDEO PROVIDERS AND SERVICES	
<ul style="list-style-type: none"> • What is the location of your family legacy photos, i.e., specific folder, online storage address, provider platform or external device? • Do you generate revenue or receive royalties from any photo or video service? • Are you able to transfer/assign purchased music/eBooks/videos to another account? 	
1.5 CLOUD-BASED APPLICATIONS, PLATFORMS AND DATA STORAGE PROVIDERS	
<ul style="list-style-type: none"> • What is the account information associated with these online storage providers? • What is the type of data and the purpose of the information that is stored with these providers? • Are these no-charge or fee services? What happens to the data when the payments stop or the account is inactive for a period of time? • Is the information encrypted? Who has the encryption key? 	
1.6 INTEGRATED ECOSYSTEM PLATFORMS (i.e., where email, data, social and cloud services are offered or bundled together).	
<ul style="list-style-type: none"> • What is the account information associated with these online storage providers? • What is the type of data and the purpose of the information that is stored with these providers? • Are these no-charge or fee services? What happens to the data when the payments stop or the account is inactive for a period of time? • Is the information encrypted? Who has the encryption key? • Does the service provider offer pre-planning or administrator access? 	
1.7 HOUSEHOLD IT AND COMMUNICATION MANAGEMENT ONLINE ACCOUNTS Examples: home phone provider, cell or mobile providers, internet and/or cable provider, router or network, network or wireless printer, home security equipment, IT or outsourced provider, IOTA devices.	
<ul style="list-style-type: none"> • Do you have an authorised backup person who has been registered with the various providers? • Have you documented procedures to manage your household IT environment and network? • Does the service provider offer administrator access for other family members or roles? • Does the service provider offer pre-planning options? 	
1.8 PASSWORD MANAGERS	
<ul style="list-style-type: none"> • Have you completed a personal risk assessment in using these types of services? • Have you secured the master password in a safe place, given that it is generally unrecoverable? • Have you set up secondary ID procedures to enable you to access the account if you lose the master password? • Does the service provider offer pre-planning options? 	

APPENDIX 1: DIGITAL ASSETS DETAILS *CONTINUED*

Digital Asset	Questions to help you complete the Inventory
1.9 DIGITAL ASSET INVENTORY MANAGEMENT VAULTS/ACCOUNTS (Digital Estate focused)	
<ul style="list-style-type: none"> • Have you completed a personal risk assessment in using these types of services? • Have you investigated the company and services in terms of viability, service record, terms of service and longevity of services? • Have you secured the master password in a safe place given that it is generally unrecoverable? • Have you set up secondary ID procedures to enable you to access the account if you lose the master password? • Have you reviewed the terms and conditions, options and process for access in terms of your estate plans and fiduciary/trustee? 	
1.10 FUNERAL, LEGACY PRE-PLANNING ACCOUNTS, HERITAGE ACCOUNTS AND SERVICES	
<ul style="list-style-type: none"> • Have you made your family and fiduciary aware of any funeral pre-planning choices and provided the location of supporting documentation or information? • For legacy, memorialisation, genealogy, historical records accounts – have you explored any pre-planning options and/or inquired with the provider about any mechanisms or choices to pre-select beneficiaries? 	
1.11 ONLINE ACCOUNTS AND PLATFORMS (Associated with volunteer efforts for a charity/not-for-profit)	
<ul style="list-style-type: none"> • Have you reviewed the digital assets associated with your volunteer activities? 	
1.12 TRADITIONAL VIRTUAL-ONLY DIGITAL ASSETS (e.g., websites, domains associated with Web 2.0)	
<ul style="list-style-type: none"> • What Web 2.0 web domains, websites and web assets do you own and for what purpose? • Have you prepared an architecture and business process flow for how the web asset works? • Have you reviewed and updated the profile and registration account information, if such exists, for each account associated with the web asset? • Who did you buy the domain(s) from? When do they expire? What payment service is used to renew the domain(s)? What company manages the domain(s)? • Have you prepared detailed instructions for fiduciary access? • Have you reviewed business accounts versus personal accounts for holding these kinds of assets? • Have you reviewed the terms of service for each provider, if one exists? • Have you check the various service providers for pre-planning and administrator access? 	

APPENDIX 1: DIGITAL ASSETS DETAILS *CONTINUED*

Digital Asset	Questions to help you complete the Inventory
1.13 DIGITAL ASSETS AND PLATFORMS ASSOCIATED with a HOBBY, ENTERTAINMENT, EDUCATION or SMALL HOME-BASED BUSINESS	<ul style="list-style-type: none"> • Do you generate revenue or receive royalties from any platform or service used to host content (i.e., self-published books, podcasts)? • Have you legally documented your business interests and made your fiduciary aware of where they can find the information?
1.14 BLOCKCHAIN ASSETS, CRYPTO-ASSETS including NFTs, Metaverse Digital Assets associated with Web3 (Web 3.0, Web3)	<ul style="list-style-type: none"> • Which cryptocurrencies or crypto-assets do you own? • Which wallet providers are you using to hold the cryptocurrencies? • Have you prepared detailed instructions for fiduciary access? • What Web3, crypto web domains or websites do you own and for what purpose? • Have you updated and tracked identifiable information about these accounts including owners, tax and other estate planning requirements? • Who did you buy the Web3 assets(s) from? When do they expire? What payment service is used to renew these services? What custodial services or companies manages these assets? • Given the nature of Web3 is decentralised, have you prepared adequate IT plans to support management and succession of these assets? • Have you reviewed business accounts versus personal accounts for holding these kinds of assets? • Have you reviewed the terms of service for each provider if one exists?
1.15 YOUR TOP-THREE MOST IMPORTANT DIGITAL ASSETS OF VALUE (Financial and/or Sentimental)	<ul style="list-style-type: none"> • Have you reviewed the terms of service? • Have you created a technical management plan for each digital asset? For example: an individual digital asset may have several components, accounts, or providers involved. Have you identified all the accounts and dependencies between the account that make up a specific digital asset of value? • Have you reviewed the elements and steps in the technical management plan with your fiduciary?
1.16 BLANK WORKSHEET TABLE FOR OTHER DIGITAL ASSETS	<ul style="list-style-type: none"> • The preceding section and digital asset categories were provided to aid in creating an inventory. You may have other online accounts and digital assets that do not fall within a specific category. Use this section to capture anything else you feel necessary for estate planning.

APPENDIX 2: DIGITAL DEVICES DETAILS

Digital Device	Type of Digital Device	Questions to help you complete the Inventory
2.1 HARDWARE	Desktop computer Laptop computer Tablet/iPad Smartphones	Does any device require two-step or two-factor authentication to access? Which account is associated with each hardware device, for example, an iPhone would have an Apple ID? Have you tested the instructions to access your hardware device? Often you will find there is yet another PIN or password or secret word required that should be captured in your access instructions.
2.2 SOFTWARE INSTALLED ON HARDWARE	List only software physically installed on computer, smartphone, tablet/iPad.	Cloud-based subscription software will be under online accounts.
Operating Systems	E.g., Windows Operating system, Apple IOS	What is the most-current version?
Applications	E.g., Virus, malware, firewall or virtual private network software	
	E.g., Microsoft Office	Is there an associated cloud account?
	E.g., Quicken/QuickBooks/Turbo Tax	Is there an associated cloud account?
2.3 FILE STORAGE DEVICES	External hard drive	Where have you physically secured the storage device, where is it locked up when not in use? Have you logically secured the data on the storage device – is the device encrypted?

APPENDIX 3: DIGITAL ACCOUNTS DETAILS

Digital Asset <i>Associated with an Underlying Asset</i>	Questions to help you complete the Inventory
<p>3.1 ONLINE ACCOUNTS PROVIDING ACCESS TO UNDERLYING FINANCIAL ASSETS OR INSURANCE Examples: bank accounts, financial institution accounts, insurance policies and/or accounts, financial or wealth planning accounts, securities trading accounts, commodity accounts, employee/ private /government pensions, investment accounts.</p>	
<ul style="list-style-type: none"> • What is the name, physical address and website address of the institution holding the underlying asset or insurance policy? • Do you receive paper statements or do you receive all your account information online? • Is another person authorised on your behalf to access the account? • What is the contact information for your banker, financial planning or investment advisor(s)? • Is there tax information or additional supporting documentation that the fiduciary should be aware of? • Do you have insurance coverage associated with these underlying assets? • Do you have additional insurance policies that the beneficiary and fiduciary should be aware of, including home, auto or other insurance? 	
<p>3.2 ONLINE ACCOUNTS PROVIDING ACCESS TO UNDERLYING DEBT AND LIABILITIES Examples: Credit cards, debt instruments, loans, mortgages.</p>	
<ul style="list-style-type: none"> • What is the name, physical address and website address of the institution holding the debt instrument? • Do you receive paper statements or do you receive all your account information online? • Is another person authorised on your behalf to access the account? • What is the contact information for the individual associated with the liability? • Do you have insurance coverage associated with this liability? 	
<p>3.3 ONLINE ACCOUNTS PROVIDING ACCESS TO UNDERLYING GOVERNMENT, PUBLIC OR PRIVATE SERVICES AND PROGRAMMES Examples: health services, health insurance provider, administrative services, taxes, property, pensions, registries, registrations.</p>	
<ul style="list-style-type: none"> • What is the name, physical address and website address of the service or programme? • Do you receive paper statements, or do you receive all your account information online? • Is another person authorised on your behalf to access the account? • What is the contact information for the individual(s) associated with these accounts? • Do you have insurance coverage associated with these services? • What is the purpose of the account and how do you access it, i.e., government pension statements or senior pension information or government services? • Are there any specific accounts where you receive information on taxes or any other interactions you have to secure your home or family with the government? • Do you have a patient portal with your health care provider or lab services? • Have you authorised someone to have access to health care information? • Do you have an online account with your property or auto insurance provider? 	

APPENDIX 3: DIGITAL ACCOUNTS DETAILS CONTINUED

Digital Asset <i>Associated with an Underlying Asset</i>	Questions to help you complete the Inventory
3.4 ONLINE ACCOUNTS PROVIDING ACCESS TO ONLINE OR THIRD-PARTY PAYMENT PROVIDERS AND SERVICES.	
<ul style="list-style-type: none"> • What is the name, physical address and website address of the payment provider? • Do you receive paper statements or do you receive all your account information online? • Do you have bank accounts or credit cards linked to the payment account? • Do you keep a balance in the online account? • Is another person authorised on your behalf to access the account? • Have you reviewed the terms of service for the account holder in terms of transferring upon incapacity and/or death? 	
3.5 ONLINE ENTERTAINMENT, CONTENT SUBSCRIPTION SERVICES AND ACCOUNTS Examples: music, eBooks, streaming services, gaming accounts, casino/betting accounts and video services.	
<ul style="list-style-type: none"> • What is your screen name, username, short name or character name, if account name is different from your legal name? • Do you generate revenue or receive royalties from any sites i.e., followers/ad revenue? • Are there any accounts that have another online account used to pay for services? • Review the terms of service to determine if you can transfer/assign to someone else? 	
3.6 ONLINE SHOPPING, MERCHANT AND TRAVEL ACCOUNTS	
<ul style="list-style-type: none"> • Is the account for personal purchases, business or revenue generation? • Is there an associated online account (i.e., third-party financial intermediary) where you transact purchases and returns? • Does the shopping, merchant or travel online account have an associated reward or points programme? 	
3.7 LOYALTY, REWARD AND FREQUENT FLYER ACCOUNTS Examples: Loyalty or rewards associated with a shop, restaurant or merchant, travel, reward or frequent flyer accounts associated with an airline, hotel, car rental, rail or bus service.	
<ul style="list-style-type: none"> • What is the name, physical address and website address of the company? • Do you receive paper statements, or do you receive all your account information online? • Is another person authorised to access the account? • Are the points or rewards transferable during life, incapacity or upon death? 	
3.8 ONLINE HOUSEHOLD OR PROPERTY MANAGEMENT ACCOUNTS Examples: utilities account, heat / air conditioning account, hydro, home support services, yard maintenance, home security system/alarm service provider, postal and/or delivery services.	
<ul style="list-style-type: none"> • Do you have household appliances with associated online accounts? • Do you have a home security system? • Do you have an authorised backup user who has the access codes and is registered with the providers? • Do you have online accounts associated with package delivery (i.e., FedEx, UPS)? 	

APPENDIX 3: DIGITAL ACCOUNTS DETAILS CONTINUED

Digital Asset <i>Associated with an Underlying Asset</i>	Questions to help you complete the Inventory
3.9 ESTATE PLANNING, INCAPACITY PLANNING AND ESTATE ADMINISTRATION PLATFORMS (Including emerging estate tech solutions, estate digital assets vaults, property rights and interests inventories, software, platforms and offerings)	
<ul style="list-style-type: none"> • Your risk tolerance and how and when you use these kinds of solutions is something to discuss and assess with your estate advisors. • Today, these vaults or platform-based accounts tend to have a single purpose, such as for managing one’s assets during life or for estate planning or taxes or other purposes. We will see these types of solutions and platforms evolve into integrated planning and inventory applications, including services that address end - to-end lifecycle needs and processes (see Section 1.9 for digital asset vault examples). • Given the end-to-end nature of estate business processes, section 1.9 and section 3.9 solutions will eventually merge into one category. For now, we have highlighted digital assets vaults (section 1.9) from the emerging tech solutions in other areas of the estate industry (section 3.9). 	

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