

Digital Legacy Plan

A Guide to the Personal and Practical Elements of Your Digital Life before You Die



Angela Crocker
and Vicki McLeod

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Dedication

*Written in loving memory of our angels:
Alex, Beryl, Marie, Stan, and Yvonne.*



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Vicki completed The Writers Studio program with a focus on narrative nonfiction. A special thank you to her mentor, author JJ Lee. Meanwhile, Angela completed her Master of Education degree with her education technology and learning design (ETLD) cohort.

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Introduction

One hundred years from now, there will be 1 billion dead people on Facebook. That's a sobering thought for each of us as we consider our own mortality. While it can be uncomfortable to talk about death, it's important to prepare the personal and practical elements of your digital life before death. In this guide, co-authors Angela Crocker and Vicki McLeod offer solutions for the practical, social, emotional, and technical aspects of your digital legacy. They include best practices for online memorials, social media and mourning, and digital etiquette in death. Tools and resources are included throughout the book to help your digital estate planning and empower your estate's executor.

From online banking to decades' worth of digital family photos, copious creative or intellectual property, or personal history documented on social media, everyone has a widespread digital footprint that tells the story of our lives. How much of that story remains online after we're gone? Who has access to banking, passwords, and important digital records? What about painful or deeply personal elements of your personal or professional legacy? In life, you have the opportunity to make choices about your digital legacy. If you don't, you risk your legacy being misinterpreted, lost, or simply becoming digital litter. It's time for a digital legacy plan.

Together, we're here to guide you as you explore your digital legacy plan. Every plan is unique yet there are common themes and elements that are universal.

Vicki provides a perspective based on many years as a certified personal and business coach and as a leader in the human potential movement. Having worked intimately with hundreds of people, Vicki understands that human beings have a handful of core desires — to have a sense of belonging, to feel creatively fulfilled, and to feel that their lives have mattered. The search for meaning is a deeply personal one. As we age, or start to consider the end of our lives, the subject of legacy becomes more important. Vicki is also an advocate for expressing authenticity in all that we do — online and off — and has been a leading voice in the world of ethical social media and digital marketing for using the internet mindfully, and finding a positive human balance between our digital and analog lives. In her book *#Untrending, A Field Guide to Social Media That Matters: How to post, tweet & like your way to a more meaningful life* (First Choice Books, 2016) she asked us to consider the legacy inherent in our social media posting habits and online behavior. She urged us to take a long view of our online engagements and how they impact the lives of those around us.

Complementing Vicki's wisdom, Angela's professional work centers on communication, community, and education. With more than 25 years on the internet, she has lived through many shifts in our digital lives; from fax to email, from newsgroups to social media, from dial-up to Wi-Fi. Her work is grounded in academic studies in mass communication, print and online publishing, education technology, and more. Drawing on that knowledge, she teaches digital life skills to help individuals and businesses navigate the online world. Ever curious, Angela is a chronic researcher seeking to experience and understand how humans communicate and connect, how communities are built and maintained, and how technology plays a role in it all. At one time, she had more than 450 unique social media accounts open, mostly for research purposes! She's especially interested in the affordances of technology that improve our lives while also advocating our right to decline technology and stick with analog solutions. Like Vicki, she is a pioneer of ethical social media. Angela first wrote about digital legacy planning briefly in her book, *Declutter Your Data: Take Charge of Your Data and Organize Your Digital Life* (Self-Counsel Press, 2018), a topic

that resonated with readers and required further resources. In collaboration with Vicki, this book fills that need.

Philosophically, we are aligned in our steadfast belief that everyone needs a digital legacy plan. Let us be your guides as you explore new, and potentially tender, territory.

Throughout the book, you will find a variety of resources and worksheets to help you. Blank copies are available in the download kit included with the purchase of this book. We recommend you print and date this material as you work with it. Additional resources are also available, particularly the “Death in the Digital Age” group on Facebook, a community facilitated by Angela and Vicki where you are invited to share your process, ask questions, and hear what others are doing.

1. What Is Digital Legacy?

A legacy is anything — material, emotional, or digital — that leaves a lasting effect after we die. Many think of this in terms of the material goods typically described in a last will and testament such as your house, your car, your jewelry. It’s also familiar to think about the emotional legacy we leave in the people who survive us — children, friends, colleagues — who remember us with love or respect or anger. Your legacy is also reflected in your body of work, or the impact you have had on the world around you. What will you be remembered for? Digital legacy is a modern extension of what we leave behind when we die.

At first glance, digital legacy might be mistaken for the technology that houses our information. Computers, mobile phones, cloud storage, and more store gigabytes or even terabytes of data in a compact package. But the real digital legacy is in the data files themselves. Some files are practical things such as financial records, land title documents, car ownership papers, custody agreements, medical details, and life insurance. Others are professional documents such as contracts, reports, databases, and client records. Additional files may be creative endeavors. Poetry, music, drawings, photography, or the novel you never finished writing could all be part of your legacy. Personal writing, too, can be left behind whether that’s a diary, gratitude journal, correspondence, or vision board. Your digital legacy goes beyond the files in your technology — think of your social media accounts, playlists, viewing history,

podcast subscriptions, and more. Collectively, all this information and more is your digital legacy. What does your data say to the future?

2. Who Needs a Digital Legacy Plan?

This guide is for anyone using the internet to transact business, manage accounts, connect with loved ones, or engage in social media. Unless you are a celebrity, large brand, institution, or corporation that already has strategies in place to deal with legacy planning in all its forms, including digital, this guide will be a valuable resource.

Perhaps you are a solopreneur or an entrepreneur with a small business. You will find this guide a helpful companion, used in conjunction with strategic business planning. It is important to safeguard your online assets, both financial and intellectual. You will want to have a plan in place for transition or succession, should something happen to you or a business partner.

If you are a rising online brand or influencer, you will want to consider the transfer of digital resources, social proof or trust, and credibility and reputation in the event of your demise. Your digital assets, whether creative, or as part of marketing and sales funnels, have value. Hopefully, the fans and followers you have amassed are a vibrant community of ambassadors for the brand(s) you represent. They offer leverage and power in the marketplace. What have you done to protect ongoing revenue from online products or services?

Our friend and colleague, Steve Dotto of Dottotech.com, is a well-known media personality. A few years ago he decided to move his brand from traditional television and radio mediums to the internet. He has rapidly become internationally recognized in digital circles as a YouTube and technology expert. Steve has a vast collection of excellent videos and online courses, as well as a significant community of patrons on Patreon who contribute monthly to support his content creation. He has developed successful online marketing and sales funnels and generates significant revenue resulting from the trust he has built with his online community. What happens to these assets once Steve is gone?

There is much to consider for those of us doing business in the digital environment. If you are a writer, visual artist, filmmaker or videographer, blogger, musician, or other creative artist, you may have finished or unfinished creative work-in-progress stored online. You will want to carefully consider what happens to your original work once it is in the hands of your estate. What about royalties from existing or posthumous works?

For example, *Digital Legacy Plan* is Angela's fifth book. Her work will no doubt stand the test of time and will continue to be published. She is also a prolific digital content creator. As mentioned, in the course of her research, Angela has opened more than 450 social media accounts for research purposes. While she's made significant efforts to declutter her data, she'll likely have research-in-progress that will need to be managed by her digital steward after death (in this book we use digital steward to indicate the person who will oversee your digital legacy). She will need to consider the fate of future royalties as well as what her estate should do with her unfinished or unpublished creative work.

Working professionals are likely to have transition plans in place if they work for others, but it is important to think about digital assets you may keep on home computers, in your personal phone, or in filing systems outside of the corporate purview. What happens to them should something happen to you?

Our friend, Fred Armstrong, works at a senior level in local government. If he needs to do work from home, he can use a work laptop, or access his desktop remotely, and work in the city's ecosystem. If something happens to him, the IT department can access his files through their shared document management system. If your workplace or organization doesn't have this kind of system in place, what happens to your remotely generated work-related data?

If you are a professional with your own practice, for example, a medical, financial, or legal practitioner, you must think about transition plans. This applies not only to the running of your practice and the role of staff, but also to the management of client files and important records. While Vicki and her husband were preparing an early iteration of their personal wills, the notary they had hired died. The McLeods were unable to access the records or copies of their draft documents. Ironically, the notary did not have a plan

in place and left a mess behind. The McLeods were forced to start from scratch.



In the process of researching this book, we conducted a survey of our peers working in the digital space. From content creators to technical experts to digital strategists, this group lives and works online with great skill and solid know-how. When we asked if they had digital legacy plans for their data, 50 percent reported that they had digital legacy plans in place while the rest did not.

We also asked the same group if they want to live on digitally after death. Fifty percent indicated that they want to live on digitally while the rest of the group added questions or caveats to their potential digital future. One wanted their professional legacy preserved while another sought to secure intellectual property. Others wanted the majority of their digital assets deleted and some haven't given the issue any thought yet.

While this data is drawn from a convenience sample, we believe it is a strong indicator of the shifting considerations for us all as we live increasingly digital lives.

Consultants and other contractors need to think about client files and ongoing project work. Who on the team has access to the important information and can pick up the ball, or pass it along should you no longer be at the helm? Is any of that information proprietary or privacy sensitive? If so, it will need special attention.

Vicki and her husband Ian are partners in business and in life. They have a limited company and hold share certificates. They work closely with clients at the senior levels of organizations and much of their work is of a sensitive and strategic nature. In addition to the legal considerations of succession for their corporation, they need to consider safeguarding sensitive client information and have transition plans in place for important projects. As well, in her work as a personal coach, Vicki needs to have a plan for private client records and communications.

Professional considerations aside, nearly everyone who has a computer or mobile phone has amassed a substantial collection of personal (possibly private) data. From family photographs to personal records, after your death family members will need to decide what to keep and what to delete. Direction from you, while you are still living, will be invaluable to them. If you are married, your spouse will seek and be grateful for anything that soothes his or her grief. If you are a single parent, your child or children may need to make these choices on their own. If you are childless, your estate executor or other next-of-kin will be called on to deal with these decisions.

Are you in the business of death? We are thinking here about funeral directors, insurance brokers, notaries, estate planners, and others who may work with the dying, the bereaved, or those who are planning their estates. We hope you will keep a copy of this book handy as a reference. Better yet, buy copies to offer to your clients as a resource. We say this only slightly tongue-in-cheek. The information you will find here will be invaluable to your clients.

You may be someone who doesn't see what all the fuss is about. After all, you'll be dead, so what difference does it make? You are right, it may not make a difference to you, but it will make a difference to those who come after you. Even simply conveying the attitude "I don't care what happens to my digital legacy after I die" will be helpful to your loved ones.

Of course, given the subject of this book we urge you to be more thoughtful and pragmatic in your approach. What we hope is that you will consider your own specific circumstances and give serious thought and planning time to what will become of your digital presence in the same way you plan for the more tangible aspects of your estate. Take the tools and tips we offer and apply them to your unique situation. Your digital legacy plan can take any form that works for you and your digital assets. This might be a simple letter stored with your will. Or maybe it's an extensive document that you email to your executor and/or digital steward. The worksheets you'll complete as part of the exercises described throughout this book can also be bundled to create your digital legacy plan. You can save hard copies, scan them into a PDF, or both. You know best what your needs are, and who is most likely to have to take care of executing your wishes. Plan with them in mind.

If you are the executor of an estate, or you are simply a friend or family member who has been left with the task of sorting through a lifetime of accrued digital “stuff,” this book will better equip you for a difficult task. We’ll provide you with concrete steps you can take to sort through what is important and why, and also respect the emotional process and toll this kind of administration can take.

3. Why Digital Legacy Planning Is Important

Digital legacy planning is important for many of the reasons listed above. For entrepreneurs, artists, and other professionals it offers the following:

- Ease of business transition and succession.
- Continuity of important or confidential client or corporate work.
- Transfer of hard earned social proof and follower trust.
- Preservation of personal or professional reputation.
- Protection of intellectual and creative property.
- Strategy for online revenues or valued marketing and sales systems.

On the personal side, digital legacy planning empowers you to determine for yourself what your personal legacy will be, at least online. It encourages you to start now with the thoughtful consideration of what you choose to post about yourself, your family, or your business, understanding that these posts could well outlast you. Hopefully, digital legacy planning will inspire you to think about how you choose to engage online, with social media, in comment threads, or as a content contributor. This kind of planning puts you in the driver’s seat in terms of designing your online legacy. Making these choices now means your loved ones won’t have to do so later.

Failure to plan may mean that others may be left with a mess to clean up. Assuming that those dealing with your estate will be grieving, adding the additional burden of sifting through years, possibly decades, of accumulated data simply isn’t fair. Adding to

that, your loved ones will need access to important data you have stored in order to fulfill your wishes. Making it easily accessible to them is an act of love, one you can perform now, while you are living so that it will be easier for them once you are dead.

To help you create your digital legacy plan, we've designed a series of worksheets that correspond to the various topics throughout this book. You'll find completed samples to illustrate how to use each worksheet in the relevant chapter. From naming your digital steward to passing on your passwords, the worksheets will prompt you to provide the necessary information. Blank copies are available in the digital download kit included with your purchase of this book. See the end of the book for instructions on how to access the download kit. If you complete some or all of the worksheets, your digital steward will be better informed about your digital footprint, your digital wishes after death, and your digital legacy.