FORT LEGACY

A PRACTICAL GUIDE + FILLABLE WORKBOOK

Handle Digital Accounts After a Death

A practical guide to phones, email, photos, and online accounts after a death

Know what to do first.

Preserve what matters.

Keep track of every next step.

UNITED STATES EDITION / ENGLISH

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01 / FIRST STEPS

Start here: preserve your options

Choose a coordinator. Helpers can gather records and prepare questions; the authorized representative makes formal requests. Give each urgent task one next action, one owner, and a review date.

The first practical steps

- ☐ Locate phones, computers, chargers, external drives, paper instructions, and any named legacy contacts. Record where each item is kept.
- ☐ Keep devices physically secure. Avoid factory resets, trade-ins, deletion, or repeated passcode guesses. Keep a usable device charged when safe to do so.
- ☐ Before cancelling a phone line or email account, list the other services that depend on it. Ask the provider about preservation and billing while authority is established.
- ☐ Look for time-sensitive renewal notices or reports of suspicious activity in records you are authorized to use. Tell the relevant provider promptly.
- ☐ Choose a private folder for correspondence and a separate contact email belonging to the person coordinating the estate.

Over the following week

Identify the estate representative, assemble the documents on page 4, and begin the account list on page 18. Pick the three most urgent tasks. These are usually preserving irreplaceable material, protecting connected access, and addressing active billing or misuse. Record a next action and owner for each.

> ### A useful stopping point
>
> It is progress to write down 'Do not close yet: photos still need review.' Waiting for an informed decision is often safer than submitting an irreversible request.

Fort Legacy article: first digital steps after a loss

https://www.fortlegacy.com/articles/do-this-first-when-a-loved-one-dies-managing-digital-accounts

WORKSHEET / FINAL PHONE CHECK

Before releasing a phone number

Complete this with the authorized representative. Leave the line in its current agreed state while unresolved items are reviewed with the carrier.

- ☐ We have recorded the number, carrier, account role, and person authorized to request a change.
- ☐ We have reviewed known recovery links to email, photos, banking, and other services.
- ☐ Each critical dependency is resolved or has a documented plan with the relevant provider.
- ☐ Important voicemail or messages have been preserved through an authorized method, where possible.
- ☐ We have considered whether the number should be retained or transferred instead of cancelled.
- ☐ The carrier has explained the effects on other lines, discounts, financed devices, and the final bill.
- ☐ If transferring, both providers have confirmed the sequence and we have not cancelled prematurely.
- ☐ The physical device and its stored data have a separate preservation or disposal plan.
- ☐ The representative has approved the action and we know how to obtain confirmation.

Unresolved item / next step

Carrier case reference / contact date

Decision and person approving it

Effective date / confirmation saved at