

How to Manage a Client's Digital Estate After Death —

Day 19 by [Amy Sitnick](#) AUG 19, 2015

In our exploding digital world, it's essential to help clients plan for both their real-life and digital estates.

There are many questions involved: Who's in charge when it comes to digital property? Who wants to approach a widow who is grieving about taking down the deceased's account? Do family members have the right to access their loved one's account after a death? Would the individual who has passed want family members to access their content, or to have the account removed? Is it possible to commemorate the person by memorializing the accounts?

These conversations can go well beyond the topic of social media. It's important to consider all the digital assets of the deceased, including email accounts and websites for online bill paying, retail accounts such as PayPal and photo sharing accounts. These sites contain sensitive personal information and financial data that could pose privacy concerns if left unattended indefinitely.

PLANNING TIPS

Here are some pointers to pass along to clients and their families, and tips for you to consider for your own planning needs.

First, consider the key questions to ask your clients:

What social media platforms do you use?

What are your passwords?

What would you like to happen to these accounts after you die?

Then:

Document the Stated Goals. And, if applicable, share these with the client's attorney or whomever your client names as their "digital executor."

Leverage Technology. There are many client portals available today to house important client documents.

Provide Legal Documentation. When individuals pass suddenly, or if they haven't outlined their wishes for terminating a social media account, each of the major social media channels will typically request legal documentation in order to begin the closure process (check out this helpful infographic [from Mashable](#)).

DELETING DIGITAL ASSETS —

However, this is a very new area, and each of these sites is in its infancy in terms of putting together policies. We have heard heartbreaking stories of people who put all their photos on Facebook and haven't provided anyone with a password. Upon their passing, Facebook was not able to give the family access to the account, and all the photos were lost.

Here's a quick rundown of what is required by the most popular networking sites when discontinuing a social media account:

Facebook: Facebook has two options for what to do with a deceased family member's account.

- **Memorializing a profile.** This feature allows the account to be viewed but not edited (with the exception of a legacy contact allowed to make one final post, usually regarding funeral arrangements, etc.)
- **Terminating an account.** An individual can deactivate a profile by completing a Special Request for Deceased Person's Account; it is necessary to provide your relationship as well as a copy of the deceased person's death certificate, birth certificate or proof of authority for the family member handling the deactivation.

LinkedIn: There are two options to handle a deceased person's account.

- **What is needed.** If you have the password of the individual, you may follow LinkedIn's instructions to simply close the account. However, if you do not, there is a process to terminate the account that requires you to provide certain information about the deceased person.
- **Who can do it:** In LinkedIn's case, it can be any one of the following: immediate family (spouse, parent, sibling, child), extended family (grandparent, aunt, uncle, cousin) or non-family (friend, co-worker, classmate).

Twitter: Twitter will work with the estate to remove an account.

- **What is needed:** Fax copies of the death certificate and your government-issued ID (such as a driver's license), along with a signed, notarized statement and either a link to an online obituary or a copy of the obituary from a local paper.
- **Who can do it:** A verified immediate family member of the deceased or a person authorized to act on behalf of the estate.

YouTube: As YouTube is affiliated with Google, you must reference the policies on Google's site. It provides for a number of options, including closing the account and requesting funds from the account.

- **What is needed:** To terminate a YouTube account, you can begin the process here.
- **Who can do it:** Immediate family members and representatives.

Keep in mind that social media accounts often change their policies, and it's important to revisit procedures even after you've had a conversation about terminating an account.