

8.1 -- Protect Against Identity Theft (First 1-4 Weeks)

- Notify Social Security Administration (1-800-772-1213)
- Send certified death certificate copies to Equifax, Experian, TransUnion
- Request each bureau flag the file as 'deceased' and freeze credit
- Send death certificate copy to the IRS to flag the SSN
- Cancel driver's license with the DMV
- Monitor deceased's credit reports monthly for at least one year
- Notify USPS to forward or hold mail
- Be wary of phishing emails, scam calls, and bereavement scams

8.2 -- Account-by-Account Review (First 1-4 Weeks)

- Create a master spreadsheet of discovered accounts (name, status, action, date)
- Prioritize: financial > email > cloud storage > social media > everything else
- For each account: transfer ownership, memorialize, close/delete, or leave for now
- Keep records of every call, email, and ticket number
- Request a deceased person's credit report to discover unknown financial accounts

Account tracking spreadsheet location:

8.3 -- Social Media Decisions (First 1-4 Weeks)

There is no rush on these. Take your time.

- Decide whether to memorialize, delete, or leave each social media account as-is
- If memorializing Facebook: use Memorialization Request form or contact Legacy Contact
- If deleting: gather content you want to preserve FIRST
- Consider downloading a full data archive from each platform before making changes
- If accounts are public, consider restricting access to prevent bots/scammers
- Transfer admin rights for groups, pages, Discord servers, or communities

8.4 -- Subscription Cancellation (First 1-4 Weeks)

- Search email for all subscription-related emails
- Check app stores (iOS, Google Play) for active subscriptions

- Check password manager for accounts with payment methods
- Cancel streaming, SaaS, and membership subscriptions
- Contact domain registrars if deceased owned domains
- Cancel or transfer utility accounts tied to online portals
- Address any Buy Now Pay Later balances

Subscriptions cancelled (service, date, confirmation):

9.1 -- Digital Asset Settlement (1-6 Months)

- Work with estate attorney on accounts requiring legal documentation
- Gather and file paperwork (death certificates, letters testamentary, court orders)
- Transfer ownership of domains, websites, or online businesses
- Address cryptocurrency holdings (consult crypto-knowledgeable advisor before moving funds)
- Determine value of digital assets for the estate
- File final tax returns noting digital income sources

9.2 -- Data Preservation (1-6 Months)

- Download and archive photos, videos, and documents from all cloud services
- Export email archives if desired
- Save voicemails, voice messages, or audio recordings
- Back up phone data BEFORE the phone plan is cancelled or device wiped
- Create consolidated memorial archive on physical drive and/or shared cloud folder
- Consider creating a printed photo book or physical memorial artifact

9.3 -- Online Presence Cleanup (1-6 Months)

- Review and update/remove online profiles in search results
- Remove deceased from data broker sites (or use DeleteMe)
- Cancel USPS Informed Delivery account
- Close or remove listings on professional directories
- Decide on personal website/blog: maintain as memorial, archive, or take down
- Google the deceased's name periodically to catch unauthorized identity use

10 -- Long-Term Vigilance

Continue monitoring credit reports for at least 2 years

Watch for annual subscription renewals that appear months later

Keep record of all accounts closed, transferred, or memorialized

Maintain physical backup of preserved digital memories in safe location

Be aware some platforms auto-delete accounts after legacy access period

Long-term monitoring notes: