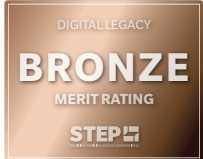


# DIGITAL LEGACY SCORECARD

SERVICE PROVIDER	SCORE	MERIT RATING
Amazon	1/8	

Amazon does not have explicit measures for addressing accountholders' incapacity. Although it provides 'bereavement support' it seems focused on closing the account. It was not possible to determine from the terms and conditions and general information if there is a procedure for recovering information on behalf of a deceased user's heirs or a fiduciary. Its policy is that once an account is closed, all information becomes unavailable.

BASIC REQUISITES	YES	NO	COMMENTS
<b>Is technological capacity for inactive accounts enabled?</b>			
Monitors email accounts and data after specified period of inactivity		●	Indicates it does but not specifically for inactive account purposes (In 'Your Account' or 'Your Profile')
Retains and backs up account data and provides secured 'inactive status' for a determined reasonable period or as required by law		●	Not specifically for inactive account purposes. Closing of accounts is final and renders all data as unavailable (even the data stored in devices connected to Amazon). Only some data is retained for legal reasons (even the one stored in devices connected to Amazon) retains some data for legal reasons.
<b>Does it have options for an accountholder to address death and specific administration options that allow a fiduciary to address the death of an accountholder?</b>			
Terms of service addressing death		●	
Planning tools for death		●	
Fiduciary access for death	●		There is a dedicated email address for bereavement support and instructions for closing the account after someone's death: <a href="mailto:bereavement-support-cs@amazon.com">bereavement-support-cs@amazon.com</a> (there are country specific email addresses)
<b>Does it have options for an accountholder to address incapacity and specific administration options that allow a fiduciary to address the incapacity of an accountholder?</b>			
Terms of service addressing incapacity		●	
Planning tools for incapacity		●	
Fiduciary access for incapacity		●	Would need to approach customer service for a response.

ADDITIONAL MERITS	YES	NO	COMMENTS
<b>BRONZE</b>			
<b>Has it taken sufficient steps to communicate the legacy options to users?</b>			
Communicates options to users across multiple channels so they are aware that they exist		●	
Maintains a database of frequently asked questions	●		
Acknowledges that managing the inactive account involves processing sensitive personal information and has in place forms and document consents for such processing	●		<i>Data security notice included in the main privacy notice in the main privacy notice, which are jurisdiction specific based on which Amazon platform you are using.</i>
<b>SILVER</b>			
<b>Does it provide sufficient other support?</b>			
Customer service has a designated service account/phone number/chatbot enabled for handling requests upon death/incapacity of accountholders		●	
Offers additional support via help documentation and/or consulting services		●	
Provides other access channels to assist accountholders, fiduciaries, and/or advisors	●		<i>Customer support exists, with a dedicated email for death: <a href="mailto:bereavement-support-cs@amazon.com">bereavement-support-cs@amazon.com</a>. Nothing similar was found about incapacity.</i>
Consults with estate industry experts to develop tools		●	
<b>GOLD</b>			
<b>Does it have a fully integrated programme covering all aspects of estate planning and the estate administration lifecycle of an accountholder?</b>			
The platform regularly iterates and updates tools by incorporating customer feedback and makes tool usage data public		●	
Provides current links to, or publishes articles on the status of, relevant jurisdictional-specific digital asset laws, cases and implications for planning and fiduciary access		●	
Has clearly determined a number of available options for the account after inaction, i.e: either memorialising the account or deleting it		●	
Has in place clear mechanisms for distribution or delivery of accountholders' digital assets		●	

*Note: This evaluation is for the Amazon Web Store service and does not include products purchased via Amazon.*

## RECOMMENDED ACTIONS

1. Design and publicise a policy by which people can notify Amazon that a user has lost the capacity to manage their own account, and request that the account is set to hibernation.
2. Confirm policies on monitoring inactive accounts. Confirm what a fiduciary or legitimate heir can do to gain access to the account before it is closed to prevent loss of data and associated digital assets.
3. Make a provision for user death and incapacity in the platform's terms of service.
4. Create a path for heirs or fiduciaries to gain access to digital assets before the closing of the account to prevent the loss of such assets.

[www.step.org](http://www.step.org)

# DIGITAL LEGACY SCORECARD

## SERVICE PROVIDER

**Apple**

## SCORE

**4/8**

## MERIT RATING



Apple's Legacy Contact tool is good for allowing a user to plan what happens to their account at death. Apple allows users to designate multiple recipients to receive the account data and information. Apple also has an easy to use platform to find about the Legacy Contact and get support. However, it fails to address what happens to an account if a user is to lose capacity.

BASIC REQUISITES	YES	NO	COMMENTS
<b>Is technological capacity for inactive accounts enabled?</b>			
Monitors email accounts and data after specified period of inactivity	●		Apple may terminate your account upon 30 days' prior notice via email to the address associated with your account if (a) your account has been inactive for one year; or (b) there is a general discontinuance of the service or any part thereof. <a href="https://www.apple.com/legal/internet-services/icloud/">https://www.apple.com/legal/internet-services/icloud/</a>
Retains and backs up account data and provides secured 'inactive status' for a determined reasonable period or as required by law	●		Retains data and account information as above specified.
<b>Does it have options for an accountholder to address death and specific administration options that allow a fiduciary to address the death of an accountholder?</b>			
Terms of service addressing death	●		Except as allowed under Digital Legacy and unless otherwise required by law, account is non-transferable and any rights to Apple ID or content within account terminate upon user's death. Upon receipt of a copy of a death certificate the user's account may be terminated and all content within the account deleted. Contact iCloud Support at <a href="https://support.apple.com/icloud">https://support.apple.com/icloud</a> for further assistance.
Planning tools for death	●		'Legacy Contact' allows user to determine who (can appoint multiple individuals) has access to data in Apple account after death. <a href="https://support.apple.com/en-us/HT212360">https://support.apple.com/en-us/HT212360</a>
Fiduciary access for death		●	Access to data by a fiduciary is not specifically addressed.
<b>Does it have options for an accountholder to address incapacity and specific administration options that allow a fiduciary to address the incapacity of an accountholder?</b>			
Terms of service addressing incapacity		●	Tool fails to address incapacity of user.
Planning tools for incapacity		●	Tool fails to address incapacity of user.
Fiduciary access for incapacity		●	Tool fails to address incapacity of user.

ADDITIONAL MERITS	YES	NO	COMMENTS
<b>BRONZE</b>			
<b>Has it taken sufficient steps to communicate the legacy options to users?</b>			
Communicates options to users across multiple channels so they are aware that they exist	●		
Maintains a database of frequently asked questions	●		<a href="https://support.apple.com/en-us/HT212360">https://support.apple.com/en-us/HT212360</a>
Acknowledges that managing the inactive account involves processing sensitive personal information and has in place forms and document consents for such processing	●		Data a legacy contact can access includes: <a href="https://support.apple.com/en-us/HT212362">https://support.apple.com/en-us/HT212362</a>
<b>SILVER</b>			
<b>Does it provide sufficient other support?</b>			
Customer service has a designated service account/phone number/chatbot enabled for handling requests upon death/incapacity of accountholders	●		Apple Support: <a href="https://getsupport.apple.com/?caller=ikb">https://getsupport.apple.com/?caller=ikb</a>
Offers additional support via help documentation and/or consulting services	●		How to add a Legacy Contact for your Apple ID: <a href="https://support.apple.com/en-us/HT212360">https://support.apple.com/en-us/HT212360</a>
Provides other access channels to assist accountholders, fiduciaries, and/or advisors		●	
Consults with estate industry experts to develop tools		●	Unknown
<b>GOLD</b>			
<b>Does it have a fully integrated programme covering all aspects of estate planning and the estate administration lifecycle of an accountholder?</b>			
The platform regularly iterates and updates tools by incorporating customer feedback and makes tool usage data public			Unknown
Provides current links to, or publishes articles on the status of, relevant jurisdictional-specific digital asset laws, cases and implications for planning and fiduciary access		●	
Has clearly determined a number of available options for the account after inaction, i.e: either memorialising the account or deleting it		●	
Has in place clear mechanisms for distribution or delivery of accountholders' digital assets	●		Yes, if Legacy Contact named by user: <a href="https://support.apple.com/en-us/HT212362">https://support.apple.com/en-us/HT212362</a>

## RECOMMENDED ACTIONS

1. Include options for incapacity planning in the Legacy Contact tool.
2. Include provisions for the incapacity of a user in the platform's terms of service.

# DIGITAL LEGACY SCORECARD

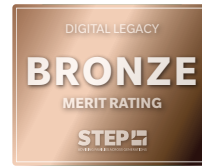
## SERVICE PROVIDER

**Coinbase**

## SCORE

**4/8**

## MERIT RATING



Coinbase has published a policy that partly deals with the monitoring of accounts during periods of inactivity. There is a section relating to death, which includes procedures related to account freezing and fiduciary access. However, the policy does not mention incapacity or how it would be dealt with.

BASIC REQUISITES	YES	NO	COMMENTS
<b>Is technological capacity for inactive accounts enabled?</b>			
Monitors email accounts and data after specified period of inactivity	●		Refers to 'several years' during which there is no record of an individual accessing relevant services or during which Coinbase is unable to contact the individual.
Retains and backs up account data and provides secured 'inactive status' for a determined reasonable period or as required by law	●		Retains data and specifically 'freezes' the account in the event of a reported death or an inability to contact the accountholder.
<b>Does it have options for an accountholder to address death and specific administration options that allow a fiduciary to address the death of an accountholder?</b>			
Terms of service addressing death	●		Deals with freezing account if notified of death, until a designated fiduciary has opened an account, or sufficient proof has been received that the individual is alive and well.
Planning tools for death		●	No actual tools like nominating a designated fiduciary on an active account.
Fiduciary access for death	●		Deals with designated fiduciary and what is acceptable in situations where a designated fiduciary has not been selected.
<b>Does it have options for an accountholder to address incapacity and specific administration options that allow a fiduciary to address the incapacity of an accountholder?</b>			
Terms of service addressing incapacity		●	Does not address
Planning tools for incapacity		●	Does not address
Fiduciary access for incapacity		●	Does not address

ADDITIONAL MERITS	YES	NO	COMMENTS
<b>BRONZE</b>			
<b>Has it taken sufficient steps to communicate the legacy options to users?</b>			
Communicates options to users across multiple channels so they are aware that they exist		●	Information can only be found on <a href="https://www.coinbase.com">Coinbase.com</a>
Maintains a database of frequently asked questions	●		FAQs section does exist on the website and it does specifically have an article dealing with how to gain access to a deceased family member's Coinbase account.
Acknowledges that managing the inactive account involves processing sensitive personal information and has in place forms and document consents for such processing		●	Does not specifically advise of this.
<b>SILVER</b>			
<b>Does it provide sufficient other support?</b>			
Customer service has a designated service account/phone number/chatbot enabled for handling requests upon death/incapacity of accountholders		●	A chatbot is in place for queries but there is no specific communication in relation to death/incapacity.
Offers additional support via help documentation and/or consulting services		●	
Provides other access channels to assist accountholders, fiduciaries, and/or advisors		●	
Consults with estate industry experts to develop tools		●	
<b>GOLD</b>			
<b>Does it have a fully integrated programme covering all aspects of estate planning and the estate administration lifecycle of an accountholder?</b>			
The platform regularly iterates and updates tools by incorporating customer feedback and makes tool usage data public		●	
Provides current links to, or publishes articles on the status of, relevant jurisdictional-specific digital asset laws, cases and implications for planning and fiduciary access		●	
Has clearly determined a number of available options for the account after inaction, i.e: either memorialising the account or deleting it		●	
Has in place clear mechanisms for distribution or delivery of accountholders' digital assets		●	

## RECOMMENDED ACTIONS

1. Develop a policy dealing with incapacity and fiduciary access that clearly indicates when this is applicable and how Coinbase can be notified.
2. Create planning tools that allow someone to determine what happens to their account in the event of incapacity and death.
3. Provide a customer service channel that provides information and deals with death and incapacity with clear contact details.

# DIGITAL LEGACY SCORECARD

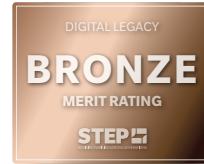
## SERVICE PROVIDER

**Dropbox**

## SCORE

**3/8**

## MERIT RATING



Dropbox has provision for deceased users, and a 12-month inactivity period for deletion of accounts. However, it does not explicitly address incapacity.

BASIC REQUISITES	YES	NO	COMMENTS
<b>Is technological capacity for inactive accounts enabled?</b>			
Monitors email accounts and data after specified period of inactivity	<input checked="" type="radio"/>	<input type="radio"/>	Inactive accounts after 12 months are to be deleted <a href="https://help.dropbox.com/account-access/email-about-inactive-account">https://help.dropbox.com/account-access/email-about-inactive-account</a>
Retains and backs up account data and provides secured 'inactive status' for a determined reasonable period or as required by law	<input type="radio"/>	<input checked="" type="radio"/>	
<b>Does it have options for an accountholder to address death and specific administration options that allow a fiduciary to address the death of an accountholder?</b>			
Terms of service addressing death	<input checked="" type="radio"/>	<input type="radio"/>	<a href="https://help.dropbox.com/es-la/account-settings/access-account-of-someone-who-passed-away">https://help.dropbox.com/es-la/account-settings/access-account-of-someone-who-passed-away</a>
Planning tools for death	<input type="radio"/>	<input checked="" type="radio"/>	Family plans or multiple email access suggested as an alternative to the files being deleted due to inactivity.
Fiduciary access for death	<input checked="" type="radio"/>	<input type="radio"/>	
<b>Does it have options for an accountholder to address incapacity and specific administration options that allow a fiduciary to address the incapacity of an accountholder?</b>			
Terms of service addressing incapacity	<input type="radio"/>	<input checked="" type="radio"/>	
Planning tools for incapacity	<input type="radio"/>	<input checked="" type="radio"/>	
Fiduciary access for incapacity	<input type="radio"/>	<input checked="" type="radio"/>	

ADDITIONAL MERITS	YES	NO	COMMENTS
<b>BRONZE</b>			
<b>Has it taken sufficient steps to communicate the legacy options to users?</b>			
Communicates options to users across multiple channels so they are aware that they exist	●		
Maintains a database of frequently asked questions	●		
Acknowledges that managing the inactive account involves processing sensitive personal information and has in place forms and document consents for such processing	●		
<b>SILVER</b>			
<b>Does it provide sufficient other support?</b>			
Customer service has a designated service account/phone number/chatbot enabled for handling requests upon death/incapacity of accountholders		●	
Offers additional support via help documentation and/or consulting services		●	
Provides other access channels to assist accountholders, fiduciaries, and/or advisors		●	
Consults with estate industry experts to develop tools		●	
<b>GOLD</b>			
<b>Does it have a fully integrated programme covering all aspects of estate planning and the estate administration lifecycle of an accountholder?</b>			
The platform regularly iterates and updates tools by incorporating customer feedback and makes tool usage data public		●	
Provides current links to, or publishes articles on the status of, relevant jurisdictional-specific digital asset laws, cases and implications for planning and fiduciary access		●	
Has clearly determined a number of available options for the account after inaction, i.e: either memorialising the account or deleting it	●		
Has in place clear mechanisms for distribution or delivery of accountholders' digital assets		●	<i>The request must be filed by a legally entitled person and gets processed on a case-by-case basis.</i>

## RECOMMENDED ACTIONS

1. Design and publicise a policy by which people can notify Dropbox that a user has lost the capacity to manage their own account, request access to the data and set the account to hibernation.
2. Include user incapacity in the platform's terms of service.
3. Design and publicise a pre-planning tool with a mechanism allowing users to instruct who should gain access to their data in their absence, before closing their account.



# DIGITAL LEGACY SCORECARD

## SERVICE PROVIDER

**Facebook**

## SCORE

**6/8**

## MERIT RATING



Tools exist to plan for death with loss of capacity also given some consideration. A Facebook 'legacy contact' can be created who can choose to memorialise the account and will have limited access to it. Deactivation may be requested instead of deletion. There is a web-based form with simple instructions for filing a request, including a list of documents to upload.

BASIC REQUISITES	YES	NO	COMMENTS
<b>Is technological capacity for inactive accounts enabled?</b>			
Monitors email accounts and data after specified period of inactivity	●		<a href="https://www.facebook.com/help/3434203120011796">https://www.facebook.com/help/3434203120011796</a>
Retains and backs up account data and provides secured 'inactive status' for a determined reasonable period or as required by law	●		<a href="https://www.facebook.com/help/991335594313139/?helpref=hc_fnav">https://www.facebook.com/help/991335594313139/?helpref=hc_fnav</a>
<b>Does it have options for an accountholder to address death and specific administration options that allow a fiduciary to address the death of an accountholder?</b>			
Terms of service addressing death	●		You can choose to either appoint a legacy contact to look after your memorialised main profile or have your account permanently deleted from Facebook <a href="https://www.facebook.com/help/991335594313139/?helpref=hc_fnav">https://www.facebook.com/help/991335594313139/?helpref=hc_fnav</a>
Planning tools for death	●		Has 'legacy contact' functionality: Users can nominate one of their Facebook friends as a legacy contact. After the user dies, that legacy contact will be able to write a pinned post for the profile, or request the deletion of the account. <a href="https://www.facebook.com/help/764712286927215?helpref=uf_permalink&amp;parent_cms_id=991335594313139">https://www.facebook.com/help/764712286927215?helpref=uf_permalink&amp;parent_cms_id=991335594313139</a>
Fiduciary access for death		●	Legacy contacts do not get access to private messages. If no legacy contact is added, a court administering the estate of the deceased can issue an order directing Facebook to appoint a custodian of a deceased user's social media accounts or to add an individual as the legacy contact for a deceased user's Facebook account. <a href="https://www.facebook.com/help/991335594313139/?helpref=hc_fnav">https://www.facebook.com/help/991335594313139/?helpref=hc_fnav</a> .
<b>Does it have options for an accountholder to address incapacity and specific administration options that allow a fiduciary to address the incapacity of an accountholder?</b>			
Terms of service addressing incapacity	●		Account removal request for a medically incapacitated person: <a href="https://www.facebook.com/help/contact/191122007680088">https://www.facebook.com/help/contact/191122007680088</a>
Planning tools for incapacity		●	
Fiduciary access for incapacity	●		

ADDITIONAL MERITS	YES	NO	COMMENTS
<b>BRONZE</b>			
<b>Has it taken sufficient steps to communicate the legacy options to users?</b>			
Communicates options to users across multiple channels so they are aware that they exist	●		
Maintains a database of frequently asked questions	●		
Acknowledges that managing the inactive account involves processing sensitive personal information and has in place forms and document consents for such processing	●		
<b>SILVER</b>			
<b>Does it provide sufficient other support?</b>			
Customer service has a designated service account/phone number/chatbot enabled for handling requests upon death/incapacity of accountholders	●		
Offers additional support via help documentation and/or consulting services	●		
Provides other access channels to assist accountholders, fiduciaries, and/or advisors		●	
Consults with estate industry experts to develop tools		●	
<b>GOLD</b>			
<b>Does it have a fully integrated programme covering all aspects of estate planning and the estate administration lifecycle of an accountholder?</b>			
The platform regularly iterates and updates tools by incorporating customer feedback and makes tool usage data public	●		<i>In general the terms and conditions indicate so, but not only for digital legacy purposes.</i>
Provides current links to, or publishes articles on the status of, relevant jurisdictional-specific digital asset laws, cases and implications for planning and fiduciary access		●	
Has clearly determined a number of available options for the account after inaction, i.e: either memorialising the account or deleting it	●		<i>Provides memorialising option and account deactivation or removal requests</i>
Has in place clear mechanisms for distribution or delivery of accountholders' digital assets		●	

## RECOMMENDED ACTIONS

1. To publicise the professional advice that Meta consulted with (i.e. estate industry experts) to develop tools.
2. To enable a legacy contact the same powers in relation to the account of an incapacitated user as they have for a deceased user.

# DIGITAL LEGACY SCORECARD

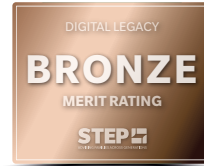
## SERVICE PROVIDER

**Google**

## SCORE

**6/8**

## MERIT RATING



Google has a clear inactive account policy and allows users to indicate who should have access to the account after the chosen period of inactivity. The contact can download data and close the account. The same tool could apply to incapacity, although terms and conditions do not expressly address it.

BASIC REQUISITES	YES	NO	COMMENTS
<b>Is technological capacity for inactive accounts enabled?</b>			
Monitors email accounts and data after specified period of inactivity	●		<a href="https://myaccount.google.com/inactive">https://myaccount.google.com/inactive</a>
Retains and backs up account data and provides secured 'inactive status' for a determined reasonable period or as required by law	●		
<b>Does it have options for an accountholder to address death and specific administration options that allow a fiduciary to address the death of an accountholder?</b>			
Terms of service addressing death	●		
Planning tools for death	●		<i>Inactive Account Manager lets Google know who should have access to your information, and whether you want your account to be deleted.</i> <a href="https://support.google.com/accounts/answer/3036546">https://support.google.com/accounts/answer/3036546</a>
Fiduciary access for death	●		<i>Can work with immediate family members and representatives to close the account of a deceased person where appropriate. In all of these cases, its primary responsibility is to keep people's information secure, safe and private.</i> <a href="https://support.google.com/accounts/troubleshooter/6357590?hl=en">https://support.google.com/accounts/troubleshooter/6357590?hl=en</a>
<b>Does it have options for an accountholder to address incapacity and specific administration options that allow a fiduciary to address the incapacity of an accountholder?</b>			
Terms of service addressing incapacity		●	
Planning tools for incapacity		●	
Fiduciary access for incapacity	●		<i>Not explicit but addressed.</i>

ADDITIONAL MERITS	YES	NO	COMMENTS
<b>BRONZE</b>			
<b>Has it taken sufficient steps to communicate the legacy options to users?</b>			
Communicates options to users across multiple channels so they are aware that they exist	●		Many responses available through Google search.
Maintains a database of frequently asked questions	●		FAQs address the subject.
Acknowledges that managing the inactive account involves processing sensitive personal information and has in place forms and document consents for such processing	●		
<b>SILVER</b>			
<b>Does it provide sufficient other support?</b>			
Customer service has a designated service account/phone number/chatbot enabled for handling requests upon death/incapacity of accountholders		●	
Offers additional support via help documentation and/or consulting services		●	
Provides other access channels to assist accountholders, fiduciaries, and/or advisors		●	
Consults with estate industry experts to develop tools		●	
<b>GOLD</b>			
<b>Does it have a fully integrated programme covering all aspects of estate planning and the estate administration lifecycle of an accountholder?</b>			
The platform regularly iterates and updates tools by incorporating customer feedback and makes tool usage data public	●		
Provides current links to, or publishes articles on the status of, relevant jurisdictional-specific digital asset laws, cases and implications for planning and fiduciary access		●	
Has clearly determined a number of available options for the account after inaction, i.e: either memorialising the account or deleting it	●		
Has in place clear mechanisms for distribution or delivery of accountholders' digital assets	●		Allows the user to indicate to whom and to what to give access.

## RECOMMENDED ACTIONS

1. Include user incapacity in the platform's terms of service.
2. Publicise the professionals that they consulted with (i.e. estate industry experts) to develop tools.

# DIGITAL LEGACY SCORECARD

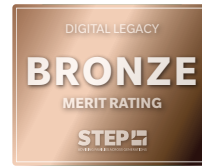
## SERVICE PROVIDER

**Instagram**

## SCORE

**2/8**

## MERIT RATING



Instagram's Terms of Service have some options for memorialisation or deletion of an account after a user's death. However, the platform has no planning options or tools to enable a user to choose what happens to their account at either death or incapacity. There is also a lack of clear guidance as to how a fiduciary or designated individual can access information and support, unless they also have an Instagram account. This makes it more difficult to take action if they do not have an account. Finding information about the death of a user was also not easily found in the terms of use.

BASIC REQUISITES	YES	NO	COMMENTS
<b>Is technological capacity for inactive accounts enabled?</b>			
Monitors email accounts and data after specified period of inactivity		●	Not clearly set out in terms of use.
Retains and backs up account data and provides secured 'inactive status' for a determined reasonable period or as required by law	●		Retains information as required by law if account temporary disabled.
<b>Does it have options for an accountholder to address death and specific administration options that allow a fiduciary to address the death of an accountholder?</b>			
Terms of service addressing death	●		
Planning tools for death		●	No option for user to customise who can access account at death or determine what information can be disclosed to fiduciary.
Fiduciary access for death		●	Option to memorialise account by close family member and delete an account by fiduciary or close family member <a href="https://help.instagram.com/264154560391256/?helpref=related_articles">https://help.instagram.com/264154560391256/?helpref=related_articles</a> . However, this does not provide for fiduciary to be able to access any non-public information in user's account.
<b>Does it have options for an accountholder to address incapacity and specific administration options that allow a fiduciary to address the incapacity of an accountholder?</b>			
Terms of service addressing incapacity		●	
Planning tools for incapacity		●	
Fiduciary access for incapacity		●	Not listed in terms of use.

ADDITIONAL MERITS	YES	NO	COMMENTS
<b>BRONZE</b>			
<b>Has it taken sufficient steps to communicate the legacy options to users?</b>			
Communicates options to users across multiple channels so they are aware that they exist		●	Communicates memorialisation and deletion option through articles <a href="https://help.instagram.com/264154560391256/?helpref=related_articles">https://help.instagram.com/264154560391256/?helpref=related_articles</a>
Maintains a database of frequently asked questions	●		
Acknowledges that managing the inactive account involves processing sensitive personal information and has in place forms and document consents for such processing	●		<a href="https://help.instagram.com/231764660354188?helpref=faq_content">https://help.instagram.com/231764660354188?helpref=faq_content</a>
<b>SILVER</b>			
<b>Does it provide sufficient other support?</b>			
Customer service has a designated service account/phone number/chatbot enabled for handling requests upon death/incapacity of accountholders	●		Must be a user to easily see contact information.
Offers additional support via help documentation and/or consulting services	●		
Provides other access channels to assist accountholders, fiduciaries, and/or advisors		●	
Consults with estate industry experts to develop tools		●	
<b>GOLD</b>			
<b>Does it have a fully integrated programme covering all aspects of estate planning and the estate administration lifecycle of an accountholder?</b>			
The platform regularly iterates and updates tools by incorporating customer feedback and makes tool usage data public		●	Unknown.
Provides current links to, or publishes articles on the status of, relevant jurisdictional-specific digital asset laws, cases and implications for planning and fiduciary access		●	
Has clearly determined a number of available options for the account after inaction, i.e: either memorialising the account or deleting it	●		Not determined after account inaction: account memorialising or deletion is only initiated by request of family member or fiduciary.
Has in place clear mechanisms for distribution or delivery of accountholders' digital assets		●	

## RECOMMENDED ACTIONS

1. Provide a pre-planning tool so users can choose whether their account is deleted or memorialised in the event of their death. Users need the option of naming a person who can access their private data in the event of their death or incapacity.
2. Provide more clear guidance and support on the platform for handling a user's account at death.
3. Make provision for a user's death and incapacity in the platform's terms of service.

# DIGITAL LEGACY SCORECARD

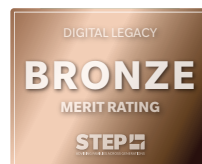
## SERVICE PROVIDER

**LinkedIn**

## SCORE

**1/8**

## MERIT RATING



LinkedIn has some limited provision for deceased users, permitting an authorised person to determine whether the account is closed or memorialised. However, there is no pre-planning tool or explicit policy on incapacitated users. There is no way to ensure that a designated person could access private data after the death or incapacity of a user. This could be a problem for users who use LinkedIn private messages for business purposes. There appears to be no policy for monitoring inactive accounts.

BASIC REQUISITES	YES	NO	COMMENTS
<b>Is technological capacity for inactive accounts enabled?</b>			
Monitors email accounts and data after specified period of inactivity		●	Although accounts can be manually set to 'hibernation' ( <a href="https://www.linkedin.com/help/linkedin/answer/a1336653">https://www.linkedin.com/help/linkedin/answer/a1336653</a> ) there is no automated process.
Retains and backs up account data and provides secured 'inactive status' for a determined reasonable period or as required by law	●		Accounts can seemingly remain in hibernation indefinitely. If an account is closed, it can be mostly recovered within 14 days ( <a href="https://www.linkedin.com/help/linkedin/answer/a1379064">https://www.linkedin.com/help/linkedin/answer/a1379064</a> ). If an account is reported as deceased, it will be hidden but remain open pending memorialisation or closure by an authorised person ( <a href="https://www.linkedin.com/help/linkedin/answer/a1380121">https://www.linkedin.com/help/linkedin/answer/a1380121</a> ).
<b>Does it have options for an accountholder to address death and specific administration options that allow a fiduciary to address the death of an accountholder?</b>			
Terms of service addressing death		●	Not explicitly addressed. Sharing of accounts or passwords is prohibited (clause 2.2) <a href="https://www.linkedin.com/legal/user-agreement">https://www.linkedin.com/legal/user-agreement</a>
Planning tools for death		●	
Fiduciary access for death		●	Anyone can report an account as deceased, at which point it will be hidden ( <a href="https://www.linkedin.com/help/linkedin/ask/TS-RDMLP">https://www.linkedin.com/help/linkedin/ask/TS-RDMLP</a> ). An authorised person (with authority conferred by a Court to deal with the estate) can choose to either close the account, or memorialise it ( <a href="https://www.linkedin.com/help/linkedin/answer/a1336663">https://www.linkedin.com/help/linkedin/answer/a1336663</a> ). No provision for access to content.
<b>Does it have options for an accountholder to address incapacity and specific administration options that allow a fiduciary to address the incapacity of an accountholder?</b>			
Terms of service addressing incapacity		●	Not explicitly addressed. Sharing of accounts or passwords is prohibited (clause 2.2) <a href="https://www.linkedin.com/legal/user-agreement">https://www.linkedin.com/legal/user-agreement</a>
Planning tools for incapacity		●	
Fiduciary access for incapacity		●	

ADDITIONAL MERITS	YES	NO	COMMENTS
<b>BRONZE</b>			
<b>Has it taken sufficient steps to communicate the legacy options to users?</b>			
Communicates options to users across multiple channels so they are aware that they exist		●	No pre-planning tools to communicate. Post-death options described in help guides.
Maintains a database of frequently asked questions	●		<a href="https://www.linkedin.com/help/linkedin/answer/a1336663">https://www.linkedin.com/help/linkedin/answer/a1336663</a>
Acknowledges that managing the inactive account involves processing sensitive personal information and has in place forms and document consents for such processing		●	Privacy policy does not explicitly deal with deceased/incapacitated accounts <a href="https://www.linkedin.com/legal/privacy-policy">https://www.linkedin.com/legal/privacy-policy</a>
<b>SILVER</b>			
<b>Does it provide sufficient other support?</b>			
Customer service has a designated service account/phone number/chatbot enabled for handling requests upon death/incapacity of accountholders	●		There is a form for reporting death of users ( <a href="https://www.linkedin.com/help/linkedin/ask/TS-RDMLP">https://www.linkedin.com/help/linkedin/ask/TS-RDMLP</a> ) or to close/memorialise a deceased user's account ( <a href="https://www.linkedin.com/help/linkedin/ask/ts-rmdmlp">https://www.linkedin.com/help/linkedin/ask/ts-rmdmlp</a> ). There is no support telephone helpline and webchat support is only available to LinkedIn Premium subscribers.
Offers additional support via help documentation and/or consulting services	●		Help documentation is available for options post-death <a href="https://www.linkedin.com/help/linkedin/answer/a1336663">https://www.linkedin.com/help/linkedin/answer/a1336663</a>
Provides other access channels to assist accountholders, fiduciaries, and/or advisors		●	
Consults with estate industry experts to develop tools		●	
<b>GOLD</b>			
<b>Does it have a fully integrated programme covering all aspects of estate planning and the estate administration lifecycle of an accountholder?</b>			
The platform regularly iterates and updates tools by incorporating customer feedback and makes tool usage data public		●	
Provides current links to, or publishes articles on the status of, relevant jurisdictional-specific digital asset laws, cases and implications for planning and fiduciary access		●	
Has clearly determined a number of available options for the account after inaction, i.e: either memorialising the account or deleting it	●		Accounts of deceased persons can be either closed or memorialised ( <a href="https://www.linkedin.com/help/linkedin/answer/a1336663">https://www.linkedin.com/help/linkedin/answer/a1336663</a> ) but no options for accounts for incapacitated persons.
Has in place clear mechanisms for distribution or delivery of accountholders' digital assets		●	

## RECOMMENDED ACTIONS

1. Provide a pre-planning tool so users can choose whether their account is deleted or memorialised in the event of their death. Include the option to name a person who could access their private data in the event of their death or incapacity.
2. Design and publicise a policy by which some people can notify LinkedIn that a user has lost the capacity to manage their own account, and request that the account is set to hibernation.
3. Make the policy on monitoring of inactive accounts public.
4. Include user death and incapacity in the platform's terms of service.



# DIGITAL LEGACY SCORECARD

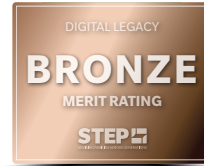
## SERVICE PROVIDER

**X / Twitter**

## SCORE

**1/8**

## MERIT RATING



X/Twitter makes very limited provision for the death and incapacity of users. If X/Twitter is notified of the death or incapacity of a user, the account will be deactivated, with no option to memorialise it. There is apparently a policy of monitoring inactive accounts and the potential for them to be deleted. The length of inactivity before this is triggered is unclear: it may be as little as 30 days. There is no pre-planning tool available to give someone access to the account in the event of death or incapacity.

BASIC REQUISITES	YES	NO	COMMENTS
<b>Is technological capacity for inactive accounts enabled?</b>			
Monitors email accounts and data after specified period of inactivity	●		Accounts 'may be' removed due to prolonged inactivity. Recommends logging in at least every 30 days to keep an account active. There is no specific period after which an account would definitely be deleted <a href="https://help.twitter.com/en/rules-and-policies/inactive-twitter-accounts">https://help.twitter.com/en/rules-and-policies/inactive-twitter-accounts</a>
Retains and backs up account data and provides secured 'inactive status' for a determined reasonable period or as required by law		●	Unclear
<b>Does it have options for an accountholder to address death and specific administration options that allow a fiduciary to address the death of an accountholder?</b>			
Terms of service addressing death		●	
Planning tools for death		●	
Fiduciary access for death		●	Accounts can only be deactivated, not memorialised ( <a href="https://help.twitter.com/en/rules-and-policies/contact-twitter-about-a-deceased-family-members-account">https://help.twitter.com/en/rules-and-policies/contact-twitter-about-a-deceased-family-members-account</a> ). No provision for access to the account content.
<b>Does it have options for an accountholder to address incapacity and specific administration options that allow a fiduciary to address the incapacity of an accountholder?</b>			
Terms of service addressing incapacity		●	
Planning tools for incapacity		●	
Fiduciary access for incapacity		●	Accounts can only be deactivated, not memorialised ( <a href="https://help.twitter.com/en/rules-and-policies/contact-twitter-about-a-deceased-family-members-account">https://help.twitter.com/en/rules-and-policies/contact-twitter-about-a-deceased-family-members-account</a> ). No provision for access to the account content.

ADDITIONAL MERITS	YES	NO	COMMENTS
<b>BRONZE</b>			
<b>Has it taken sufficient steps to communicate the legacy options to users?</b>			
Communicates options to users across multiple channels so they are aware that they exist		●	
Maintains a database of frequently asked questions	●		
Acknowledges that managing the inactive account involves processing sensitive personal information and has in place forms and document consents for such processing		●	
<b>SILVER</b>			
<b>Does it provide sufficient other support?</b>			
Customer service has a designated service account/phone number/chatbot enabled for handling requests upon death/incapacity of accountholders	●		There is a webpage for reporting deceased or incapacitated users: <a href="https://help.twitter.com/en/forms/account-access/deactivate-or-close-account/deactivate-account-for-deceased">https://help.twitter.com/en/forms/account-access/deactivate-or-close-account/deactivate-account-for-deceased</a>
Offers additional support via help documentation and/or consulting services		●	
Provides other access channels to assist accountholders, fiduciaries, and/or advisors		●	
Consults with estate industry experts to develop tools		●	
<b>GOLD</b>			
<b>Does it have a fully integrated programme covering all aspects of estate planning and the estate administration lifecycle of an accountholder?</b>			
The platform regularly iterates and updates tools by incorporating customer feedback and makes tool usage data public		●	
Provides current links to, or publishes articles on the status of, relevant jurisdictional-specific digital asset laws, cases and implications for planning and fiduciary access		●	
Has clearly determined a number of available options for the account after inaction, i.e: either memorialising the account or deleting it		●	
Has in place clear mechanisms for distribution or delivery of accountholders' digital assets		●	There is a method to download an archive of a user's own posts, but there is no indication that this could be lawfully used by a fiduciary to download the posts of a deceased or incapacitated user: <a href="https://help.twitter.com/en/managing-your-account/how-to-download-your-twitter-archive">https://help.twitter.com/en/managing-your-account/how-to-download-your-twitter-archive</a>

## RECOMMENDED ACTIONS

1. Provide a pre-planning tool, by which users can choose whether their account is deleted or memorialised in the event of their death, and (optionally) name a person who could access their private data in the event of their death or incapacity.
2. Design and publicise a policy by which certain people can notify X/Twitter that a user has lost the capacity to manage their own account, and request that the account is temporarily locked rather than being deleted altogether.
3. Confirm the policy on inactive accounts. There should be a reasonable period in which data is preserved and an account can be reinstated if necessary. The periods of inactivity before accounts are set as inactive, and before data is deleted, should be published.
4. Make provision for user death and incapacity in the platform's terms of service.

# DIGITAL LEGACY SCORECARD

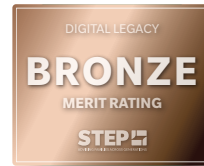
## SERVICE PROVIDER

**Yahoo**

## SCORE

**2/8**

## MERIT RATING



Yahoo has a published policy on inactive accounts. Data is permanently deleted after 12 months of inactivity. There is provision in the terms of service for rights to accounts to terminate on death of a user, but no mention of user incapacity. There is no pre-planning tool. There is a policy permitting a user's personal representatives to close the account. However, the only way for anyone to do this would be with an Irish court order. While we are pleased to see a process for fiduciary access, the cost of a court order could be avoided if users could nominate someone to obtain access in the event of their death or incapacity. Given Yahoo provides email hosting, this could be very important to many users.

BASIC REQUISITES	YES	NO	COMMENTS
<b>Is technological capacity for inactive accounts enabled?</b>			
Monitors email accounts and data after specified period of inactivity	●		Accounts can be deleted after 12 months of inactivity: <a href="https://help.yahoo.com/kb/reasons-yahoo-deactivates-deletes-account-sln2018.html">https://help.yahoo.com/kb/reasons-yahoo-deactivates-deletes-account-sln2018.html</a>
Retains and backs up account data and provides secured 'inactive status' for a determined reasonable period or as required by law		●	Content cannot be restored after account deleted for inactivity: <a href="https://help.yahoo.com/kb/SLN29338.html">https://help.yahoo.com/kb/SLN29338.html</a>
<b>Does it have options for an accountholder to address death and specific administration options that allow a fiduciary to address the death of an accountholder?</b>			
Terms of service addressing death	●		Rights to a Yahoo account (except an AOL account) terminate on death (clause 3(a)) <a href="https://legal.yahoo.com/us/en/yahoo/terms/otos/index.html">https://legal.yahoo.com/us/en/yahoo/terms/otos/index.html</a>
Planning tools for death		●	
Fiduciary access for death		●	A personal representative can apply to close the account, but access to account content will only be granted with an Irish court order: <a href="https://uk.help.yahoo.com/kb/SLN26120.html">https://uk.help.yahoo.com/kb/SLN26120.html</a>
<b>Does it have options for an accountholder to address incapacity and specific administration options that allow a fiduciary to address the incapacity of an accountholder?</b>			
Terms of service addressing incapacity		●	
Planning tools for incapacity		●	
Fiduciary access for incapacity		●	

ADDITIONAL MERITS	YES	NO	COMMENTS
<b>BRONZE</b>			
<b>Has it taken sufficient steps to communicate the legacy options to users?</b>			
Communicates options to users across multiple channels so they are aware that they exist		●	
Maintains a database of frequently asked questions	●		<a href="https://uk.help.yahoo.com/kb/SLN26120.html">https://uk.help.yahoo.com/kb/SLN26120.html</a>
Acknowledges that managing the inactive account involves processing sensitive personal information and has in place forms and document consents for such processing		●	
<b>SILVER</b>			
<b>Does it provide sufficient other support?</b>			
Customer service has a designated service account/phone number/chatbot enabled for handling requests upon death/incapacity of accountholders		●	No, just the normal customer service link: <a href="https://uk.help.yahoo.com/kb/SLN26120.html">https://uk.help.yahoo.com/kb/SLN26120.html</a>
Offers additional support via help documentation and/or consulting services		●	
Provides other access channels to assist accountholders, fiduciaries, and/or advisors		●	
Consults with estate industry experts to develop tools		●	
<b>GOLD</b>			
<b>Does it have a fully integrated programme covering all aspects of estate planning and the estate administration lifecycle of an accountholder?</b>			
The platform regularly iterates and updates tools by incorporating customer feedback and makes tool usage data public		●	
Provides current links to, or publishes articles on the status of, relevant jurisdictional-specific digital asset laws, cases and implications for planning and fiduciary access		●	
Has clearly determined a number of available options for the account after inaction, i.e: either memorialising the account or deleting it		●	
Has in place clear mechanisms for distribution or delivery of accountholders' digital assets		●	

## RECOMMENDED ACTIONS

1. Provide a pre-planning tool, by which users can name a person who would be able to access their private data in the event of their death or incapacity.
2. Design and publicise a policy by which certain people can notify Yahoo that a user has lost the capacity to manage their own account, and request that the account is temporarily locked.
3. Retain data of inactive accounts for a reasonable period before deletion, to enable the account to be restored if requested.
4. Make corresponding provision for user death and incapacity in the platform's terms of service.