

Worksheet 11: Account Security and Succession

Protect the portfolio today and make it possible for the right person to manage it later.

DO NOT WRITE PASSWORDS HERE

Record where secure credentials and recovery instructions are stored. Do not place actual passwords, recovery codes, or private keys in a printed worksheet that may be copied or misplaced.

Registrar and service inventory

Account or registrar	Domains or purpose	2FA method	Recovery location

Security review

- ☐ Every registrar and marketplace uses a unique password stored in a password manager.
- ☐ Two-factor authentication is enabled, preferably with a security key or authenticator app.
- ☐ Recovery email addresses and phone numbers are current and protected.
- ☐ Backup codes are stored securely and separately from the primary device.
- ☐ Account alerts, auto-renew, and backup payment methods are reviewed.
- ☐ High-value domains use additional locks or Registry Lock when appropriate.
- ☐ Delegated access is used instead of sharing the primary password when another person needs access.
- ☐ A response plan exists for an unauthorized login, DNS change, transfer, or payment alert.

Succession instructions

Primary successor or executor	
Alternate contact	
Attorney or advisor	
Location of portfolio inventory	
Location of secure access instructions	
Location of purchase and sale records	
Renewal funding instructions	
Domains that must not expire	
Domains or projects requiring special handling	
Preferred liquidation or sale process	

Annual review

Last security review	
Last successor review	
Next scheduled review	
Changes needed	