# Digital Assets Worksheet

**A comprehensive estate plan should include instructions not just for your physical assets, but your digital assets and online accounts as well.**

**This worksheet will help you:**

- Create a consolidated view of all the key components of your digital accounts

- Make things much easier for those who will end up handling your affairs someday.

- Give your estate planning attorney a head start on assessing your situation and preparing your plan.

**Things to remember:**

- Try to complete as much of the inventory as possible. If you need to, you can come back and complete any missing information later.

- Keep a copy of this inventory in a safe place and tell someone you trust where to find it.

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## Electronic Devices

| Phone 1 | |
|---|---|
| Owner: | Password/Unlock Code: |

| Phone 2 | |
|---|---|
| Owner: | Password/Unlock Code: |

| Computer 1 | |
|---|---|
| Owner: | Password/Unlock Code: |

| Computer 2 | |
|---|---|
| Owner: | Password/Unlock Code: |

| Tablet 1 | |
|---|---|
| Owner: | Password/Unlock Code: |

| Tablet 2 | |
|---|---|
| Owner: | Password/Unlock Code: |

| Other Device | |
|---|---|
| Owner: | Password/Unlock Code: |

| Other Device | |
|---|---|
| Owner: | Password/Unlock Code: |

## Password Manager

| *Even if you don't use an actual password manager (an online service or app to store multiple unique and strong passwords for various service sites), you should still include where you keep your passwords in the "Notes & Instructions" field below.  (Example: Word doc on laptop)* | |
|---|---|
| Service: | Login Info: |
| Notes & Instructions: | |

Date Updated: _____

| E-Mail Accounts | |
|---|---|
| **ACCOUNT 1** | |
| Provider: | Account Owner: |
| User Login: | Password: |
| **ACCOUNT 2** | |
| Provider: | Account Owner: |
| User Login: | Password: |
| **ACCOUNT 3** | |
| Provider: | Account Owner: |
| User Login: | Password: |
| **ACCOUNT 4** | |
| Provider: | Account Owner: |
| User Login: | Password: |

| Payment/Money Management Accounts | |
|---|---|
| *The most common money management apps are PayPal, Google Wallet, Visa Checkout, Mint, Learnvest & Venmo.* | |
| Site: | |
| User Name/Login: | Password: |
| Instructions: | |
| Site: | |
| User Name/Login: | Password: |
| Instructions: | |
| Site: | |
| User Name/Login: | Password: |
| Instructions: | |
| Site: | |
| User Name/Login: | Password: |
| Instructions: | |

## Social Media Accounts

| The most common social media platforms are Facebook, Twitter, LinkedIn, Instagram, Google+ and Pinterest. | |
|---|---|
| **Platform:** | |
| User Name: | Password: |
| **Platform:** | |
| User Name: | Password: |
| **Platform:** | |
| User Name: | Password: |
| **Platform:** | |
| User Name: | Password: |

## Online Store & Purchasing Accounts

| The most common shopping sites are Amazon, Ebay, Target, Walmart & Best Buy. | |
|---|---|
| **Site:** | |
| User Name: | Password: |
| **Site:** | |
| User Name: | Password: |
| **Site:** | |
| User Name: | Password: |
| **Site:** | |
| User Name: | Password: |

Date Updated: _____

## Cloud Storage Accounts

*The most common storage services are Dropbox, iCloud, Microsoft OneDrive, Box and Google Drive.*

| **Service:** | |
| --- | --- |
| User Name: | Password: |
| **Service:** | |
| User Name: | Password: |
| **Service:** | |
| User Name: | Password: |
| **Service:** | |
| User Name: | Password: |

## Video Streaming Accounts

*The most popular streaming services are Netflix, Hulu, Amazon Prime, Vudu and Redbox.*

| **Service:** | |
| --- | --- |
| User Name: | Password: |
| **Service:** | |
| User Name: | Password: |
| **Service:** | |
| User Name: | Password: |
| **Service:** | |
| User Name: | Password: |

KEEP IN A SECURE LOCATION

Date Updated: _____

| Music Accounts | |
|---|---|
| *The most popular music services are iTunes, Spotify, Pandora, Rdio and Lastfm.* | |
| **Service:** | |
| User Name: | Password: |
| **Service:** | |
| User Name: | Password: |
| **Service:** | |
| User Name: | Password: |
| **Service:** | |
| User Name: | Password: |

| Gaming | |
|---|---|
| *The most common gaming services are Xbox Live, PlayStation Plus, Steam and Battle.net.* | |
| **Service:** | |
| User Name: | Password: |
| **Service:** | |
| User Name: | Password: |
| **Service:** | |
| User Name: | Password: |
| **Service:** | |
| User Name: | Password: |

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Date Updated: _____

## Blogger/Web Hosting Accounts & Services

*The most common blogging/web hosting providers are Tumblr, Blogger, Wordpress, Weebly, Squarespace, Wix, GoDaddy, Network Solutions and Hover.*

| Site/Service: | |
|---|---|
| User Name: | Password: |
| **Site/Service:** | |
| User Name: | Password: |
| **Site/Service:** | |
| User Name: | Password: |
| **Site/Service:** | |
| User Name: | Password: |

## Software Licenses

*The most common software licenses are for Microsoft Office, iWorks, Adobe CS, Quickbooks, Turbo Tax and Antivirus Software.*

| Company: | |
|---|---|
| User Name: | Password: |
| Instructions/License Info: | |
| **Company:** | |
| User Name: | Password: |
| Instructions/License Info: | |
| **Company:** | |
| User Name: | Password: |
| Instructions/License Info: | |
| **Company:** | |
| User Name: | Password: |
| Instructions/License Info: | |

Date Updated: _____

## Food/Delivery Services

*The most common food and food delivery services are Costco, Instacart, Fresh Direct, Amazon Fresh, Seamless and Delivery.com.*

| **Service:** | |
|---|---|
| User Name: | Password: |
| **Service:** | |
| User Name: | Password: |
| **Service:** | |
| User Name: | Password: |
| **Service:** | |
| User Name: | Password: |

## Travel/Ticketing Rewards

*For example, airline frequent flier memberships, rental car accounts, casino rewards, Uber or Ticketmaster.*

| **Airline 1:** | |
|---|---|
| User Name: | Password: |
| **Airline 2:** | |
| User Name: | Password: |
| **Rental Car 1:** | |
| User Name: | Password: |
| **Company:** | |
| User Name: | Password: |
| **Company:** | |
| User Name: | Password: |
| **Company:** | |
| User Name: | Password: |
| **Company:** | |
| User Name: | Password: |

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## Messaging Services/VOIP

*The most common messaging services include Skype, WhatsApp, Kik and Snapchat*

| Service: | |
|---|---|
| Phone Number: | |
| User Name: | Password: |
| **Service:** | |
| Phone Number: | |
| User Name: | Password: |

## Notes & Personal Thoughts

*Use this section for any additional important information.*

| |
|---|
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