

Digital Assets Inventory Worksheet

The term "digital assets" refers to personal information that is stored electronically on either a computer or an online "cloud" server account that belongs to an individual. Anyone who uses e-mail, has a password protected cell phone, makes online purchases, or pays bills online has digital assets.

Digital assets generally require a user name and/or password or PIN to access and can be difficult or impossible to retrieve if someone is incapacitated or passes away. Some digital assets have a monetary value while others have sentimental value. Either way, they are often very important to the people who create them.

Use this worksheet to record all of your digital assets by category. Then keep it in a safe place and share it with your power of attorney, executor, and other trusted people who would need to have this information.

Some accounts allow for two factor authorization, so please note which accounts those are and how to access the second factor (e.g., app on phone, card in wallet, key fob, etc.). Other accounts require answers to security questions, so please note as well.

Name		
Date of Preparation/Review		
Electronic Devices (e.g., smart phone,	tablet, laptop computer, desktop o	computer, external hard drive)
Name of Electronic Device	User Name/E-mail Address	Password

E-mail Accounts (e.g., Yahoo!, Gmail, AOL, Microsoft, Hotmail, employer's e-mail account)

Name of Account & Web Address	User Name/E-mail Address	Password

Financial Accounts (e.g., banks, credit unions, brokerage accounts, mutual funds, retirement savings accounts, credit card accounts, employee benefit accounts, PayPal, Social Security)

Name of Account & Web Address	User Name	Password and Security Question Answer(s)

Organization Accounts (e.g., membership organizations and charitable organizations)

Name of Account & Web Address	User Name	Password

Photography and Music Accounts (e.g., Instagram, Snapfish, Flickr, iTunes, Spotify, digital music library)

Name of Account & Web Address	User Name	Password	



Publication Accounts (e.g., newspapers, magazines, blogs)

Social Media Accounts (e.g., Facebook, Twitter, Pinterest, LinkedIn, Google+)

Name of Account & Web Address	User Name	Password	

Video Accounts (e.g., YouTube, Vimeo)

Name of Account & Web	User Name	Password

Virtual Currency Accounts with Cash Value (e.g., Bitcoin, Farmville, Second Life, World of Warcraft)

Name of Account & Web	User Name	Password



Web Site Accounts (e.g., domain names, hosting services, online business accounts, and cloud storage sites such as Dropbox, Google Drive, Apple iCloud)

User Name	Password	
	User Name	User Name Password

Benefit Accounts (e.g., airline miles, railroad miles, hotel rewards, retailer reward/loyalty programs)

Name Account & Web Address	User Name	Password	

Online Merchant Accounts (e.g. Amazon, eBay, Etsy, Zappos)

Name of Account & Web Address	User Name	Password	



Other

Name of Account & Web Address	User Name	Password

