

DIGITAL ASSETS ORGANIZER



GORDON WEALTH PLANNING
Plan for your Future

Digital asset inventory checklist



Proactively manage all of your online accounts, memberships, and digital storage with this inventory checklist. With thoughtful planning, you can help family members or friends avoid red tape when trying to access your accounts while incapacitated.

Electronic Devices

- Smart phone
- Tablet
- Laptop computer
- Desktop computer
- External hard drive
- Flash drive

Benefit Accounts

- Airline miles rewards programs
- Railroad miles rewards programs
- Hotel rewards
- Retailer reward/loyalty programs

Email Accounts

- Gmail
- Yahoo!
- AOL
- Outlook
- Hotmail

Financial Accounts

- Banks
- Credit Unions
- Brokerage accounts
- Mutual Funds
- Retirement savings accounts
- Credit card accounts
- Employee benefit accounts
- PayPal
- Venmo
- Social Security

Online Merchant Accounts

- Amazon
- eBay
- Etsy
- Zappos
- Grocery delivery

Member Organization Accounts

- Charitable organizations
- Religious organizations
- Board membership
- Sports season ticket holder
- Yacht and boat clubs
- Country clubs
- Golf memberships

Photography/Music Accounts

- Instagram
- Snapfish
- Shutterfly
- Flickr
- iTunes

Publication Accounts

- Newspapers
- Magazine subscriptions
- Blogs

Social Media/Video Accounts

- Facebook
- LinkedIn
- Twitter
- YouTube or Vimeo
- Pinterest

Virtual Currency Accounts with Cash Value

- Bitcoin
- Video gaming (i.e., World of Warcraft, Farmville, etc.)

Website Accounts

- Domain names
- Hosting services
- Online business accounts
- Apple iCloud
- Dropbox
- Google Drive



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. Note that some accounts allow for two factor authorization, so a note needs to be made about which accounts those are and how to access the second factor (e.g., app on phone, card in wallet, key fob, etc.).

Name _____

Date of Preparation/Review _____

Electronic Devices (e.g., smart phone, tablet, laptop computer, desktop computer, external hard drive)

Name of Electronic Device and Owner/User	Password

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

Name of Benefit Account Provider, Account Owner, and Web Address	User Name	Password/PIN Number



Let's talk about your future.

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