



# 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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Date Updated: \_\_\_\_\_

Electronic Devices	
<b>Phone 1</b>	
Owner:	Password/Unlock Code:
<b>Phone 2</b>	
Owner:	Password/Unlock Code:
<b>Computer 1</b>	
Owner:	Password/Unlock Code:
<b>Computer 2</b>	
Owner:	Password/Unlock Code:
<b>Tablet 1</b>	
Owner:	Password/Unlock Code:
<b>Tablet 2</b>	
Owner:	Password/Unlock Code:
<b>Other Device</b>	
Owner:	Password/Unlock Code:
<b>Other Device</b>	
Owner:	Password/Unlock Code:

Password Manager	
<i>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 &amp; Instructions" field below. (Example: Word doc on laptop)</i>	
Service:	Login Info:
Notes & Instructions:	

Date Updated: \_\_\_\_\_

E-Mail Accounts	
<b>ACCOUNT 1</b>	
Provider:	Account Owner:
User Login:	Password:
<b>ACCOUNT 2</b>	
Provider:	Account Owner:
User Login:	Password:
<b>ACCOUNT 3</b>	
Provider:	Account Owner:
User Login:	Password:
<b>ACCOUNT 4</b>	
Provider:	Account Owner:
User Login:	Password:

Payment/Money Management Accounts	
<i>Common money management apps include ApplePay, PayPal, Venmo, Google Wallet, Visa Checkout, &amp; Mint.</i>	
Site:	
User Name/Login:	Password:
Instructions:	
Site:	
User Name/Login:	Password:
Instructions:	
Site:	
User Name/Login:	Password:
Instructions:	
Site:	
User Name/Login:	Password:
Instructions:	

Date Updated: \_\_\_\_\_

## Social Media Accounts

*Common social media platforms include Facebook, Twitter, LinkedIn, Instagram, Google+ and Pinterest.*

<b>Platform:</b>	
User Name:	Password:
<b>Platform:</b>	
User Name:	Password:
<b>Platform:</b>	
User Name:	Password:
<b>Platform:</b>	
User Name:	Password:

## Online Store & Purchasing Accounts

*Common shopping sites include Amazon, Ebay, Target, Walmart & Best Buy.*

<b>Site:</b>	
User Name:	Password:
<b>Site:</b>	
User Name:	Password:
<b>Site:</b>	
User Name:	Password:
<b>Site:</b>	
User Name:	Password:

Date Updated: \_\_\_\_\_

Cloud Storage Accounts	
<i>Common storage services include Dropbox, iCloud, Microsoft OneDrive, Box and Google Drive.</i>	
<b>Service:</b>	
User Name:	Password:
<b>Service:</b>	
User Name:	Password:
<b>Service:</b>	
User Name:	Password:
<b>Service:</b>	
User Name:	Password:

TV/Video Streaming Accounts	
<i>Common streaming services include AppleTV, Netflix, Hulu, Amazon Prime, YouTube, Vudu and Redbox.</i>	
<b>Service:</b>	
User Name:	Password:
<b>Service:</b>	
User Name:	Password:
<b>Service:</b>	
User Name:	Password:
<b>Service:</b>	
User Name:	Password:

Date Updated: \_\_\_\_\_

## Music Accounts

*Common music services include iTunes/Apple Music, Spotify, Pandora, Rdio and Lastfm.*

**Service:**

User Name:

Password:

**Service:**

User Name:

Password:

**Service:**

User Name:

Password:

**Service:**

User Name:

Password:

## Gaming

*Common gaming services include Xbox Live, PlayStation Plus, Steam and Battle.net.*

**Service:**

User Name:

Password:

**Service:**

User Name:

Password:

**Service:**

User Name:

Password:

**Service:**

User Name:

Password:

Date Updated: \_\_\_\_\_

### Blogger/Web Hosting Accounts & Services

*Common blogging/web hosting providers are Wix, WordPress, Squarespace, Medium, GoDaddy, BlueHost, Domain.com and Network Solutions.*

<b>Site/Service:</b>	
User Name:	Password:
<b>Site/Service:</b>	
User Name:	Password:
<b>Site/Service:</b>	
User Name:	Password:
<b>Site/Service:</b>	
User Name:	Password:

### Apps/Software Licenses

*Common software licenses include programs such as Microsoft Office, iWorks, Adobe CS, Quickbooks, Turbo Tax & Antivirus Software, as well as App purchases on your devices.*

<b>Company:</b>	
User Name:	Password:
Instructions/License Info:	
<b>Company:</b>	
User Name:	Password:
Instructions/License Info:	
<b>Company:</b>	
User Name:	Password:
Instructions/License Info:	
<b>Company:</b>	
User Name:	Password:
Instructions/License Info:	

## Food/Delivery Services

*Common food and food delivery services include Costco, Instacart, DoorDash, GrubHub, Fresh Direct, Amazon Fresh, Seamless and Delivery.com.*

<b>Service:</b>	
User Name:	Password:
<b>Service:</b>	
User Name:	Password:
<b>Service:</b>	
User Name:	Password:
<b>Service:</b>	
User Name:	Password:
<b>Service:</b>	
User Name:	Password:

## Travel/Transportation/Entertainment

*For example, airline frequent flier memberships, rental car accounts, AirBnB, Uber, Lyft or Ticketmaster.*

<b>Airline 1:</b>	
User Name:	Password:
<b>Airline 2:</b>	
User Name:	Password:
<b>Rental Car 1:</b>	
User Name:	Password:
<b>Company:</b>	
User Name:	Password:
<b>Company:</b>	
User Name:	Password:
<b>Company:</b>	
User Name:	Password:
<b>Company:</b>	
User Name:	Password:

Date Updated: \_\_\_\_\_

### Messaging Services/VOIP

*Common messaging services include Zoom, 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.*