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**

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

Name of E-mail Service Provider and 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 Financial Institution and Web Address	User Name	Password and Security Question Answer(s)

Online Merchant Accounts (e.g., Amazon, Blair, Chadwicks, eBay, Etsy, Zappos, Wal-Mart)

Name of Online Merchant and Web Address	User Name	Password

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

Name of Organization and Web Address	User Name	Password

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

Name of Photography/Music Account and Web Address	User Name	Password

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

Name of Publication and Web Address	User Name	Password

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

Name of Social Media Account. Account Owner, and Web Address	User Name	Password

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

Name of Video Account. Account Owner, and Web Address	User Name	Password

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

Name of Virtual Currency site, Account Owner, and Web Address	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)

Name of Web site, Account Owner, and Web Address	User Name	Password