

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 email, has a password-protected cell phone, makes online purchases, or pays bills online has digital assets.

Digital assets generally require a user name, a password, or a 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 digital assets (for yourself or clients) by category. Then keep the worksheet in a safe place and share it with your or the client’s 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 (for example, app on phone, card in wallet, key fob).

Name _____ Date of Preparation/Review _____

Electronic Devices (for example, smartphone, tablet, laptop computer, desktop computer, external hard drive)

Name of Electronic Device & Owner-User	Password

Benefit Accounts (for example, airline miles, railroad miles, hotel rewards, retailer reward/loyalty programs, i-Pass)

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

Email Accounts (for example, Yahoo!, Gmail, AOL, Outlook, Hotmail, Juno, employer’s email account)

Name of Email Service Provider & Web Address	User Name or Email Address	Password

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

Name of Financial Institution & Web Address	User Name	Password & Security Question Answer(s)

Bill Pay Accounts (for example, AT&T, Comcast, DirectTV, Dish, Spectrum, Sprint, Verizon, T-Mobile)

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

Online Merchant Accounts (for example, Amazon, Barnes & Noble, Best Buy, Blair, Chadwicks, eBay, Etsy, HelloFresh, Microsoft, Nike, Starbucks, Target, UnderArmour, Zappos, Wal-Mart)

Name of Online Merchant & Web Address	User Name	Password

Organization Accounts (for example, membership organizations and charitable organizations)

Name of Organization & Web Address	User Name	Password

Photography and Music Accounts (for example, Instagram, Snapfish, Flickr, Shutterfly, Spotify, digital music library)

Name of Photography or Music Account & Web Address	User Name	Password

Publication Accounts (for example, newspapers, magazines, blogs)

Name of Publication & Web Address	User Name	Password

Social Media Accounts (for example, Facebook, Instagram, LinkedIn, SnapChat, Twitter, Pinterest, LinkedIn, Google+)

Name of Social Media Account, Account Owner, & Web Address	User Name	Password

Video Accounts (for example, Hulu, YouTube, Vimeo, Netflix, Nintendo, PlayStation, Redbox, Samsung, Skype, Xbox, Vine, Amazon Prime)

Name of Video Account, Account Owner, & Web Address	User Name	Password

Virtual Currency Accounts with Cash Value (for example, Bitcoin, Farmville, Second Life, World of Warcraft)

Name of Virtual Currency Site, Account Owner, & Web Address	User Name	Password

Web Site Accounts (for example, domain names, hosting services, online business accounts, Bing, and cloud-storage sites such as Dropbox, Google Drive, Apple iCloud, IMDb, LastPass, Norton, McAfee)

Name of Website, Account Owner, & Web Address	User Name	Password