

Digital Assets Inventory

The term "digital assets" refers to personal and/or financial 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 and/or password or PIN to access and can be difficult or impossible to retrieve if someone is incapacitated or has died. Some digital assets have a monetary value (such as frequent flyer airline miles; reward points) while others have sentimental value (digital photographs; music libraries). Either way, they are often very important to the people who create them.

Use this worksheet to record all your digital assets by category. Keep this list with your estate planning documents and share it with your power of attorney, Personal Representative (the person named under your Last Will and Testament to handle your affairs), Trustee (if you have a trust) and other trusted people who would need to have this information. Note that some accounts require for two-step authorization/authentication, so a note needs to be made about which accounts those are and how to access the second method of authentication (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

Email Accounts

(Yahoo!, Gmail, Outlook, Hotmail)

Name of Service Provider and Web Address	Username/Email	Password

Social Media Accounts

(Facebook, Twitter, Pinterest, LinkedIn)

Name of Account Provider and Web Address	Username	Password/PIN

Online Merchant Accounts

(Amazon, eBay, Walmart)

Name of Merchant and Web Address	Username	Password

Organization Accounts

(membership organizations and charitable organizations)

Name of Organization and Web Address	Username	Password

Benefit Accounts

(airline miles, hotel rewards, retailer award/loyalty programs)

Name of Account Provider and Web Address	Username	Password/PIN

Photography & Music Accounts

(Instagram, Flickr, Snapfish, iTunes, other digital music libraries)

Name of Account Provider and Web Address	Username	Password/PIN

Video Accounts

(YouTube, Vimeo)

Name of Account Provider and Web Address	Username	Password/PIN

Website Accounts

(Domain Names, hosting services, online business accounts, and cloud storage sites such as Dropbox, Google Drive, and iCloud)

Name of Account Provider and Web Address	Username	Password/PIN