

DIGITAL ASSET INVENTORY LIST

** Our office does not keep a copy of this form unless you specifically request us to do so. We suggest that you keep the form in a secure location that your fiduciary is aware of and that you update it periodically as the information changes.*

The term “digital assets” includes data, Internet accounts and other rights in the digital world. This data may be stored locally on your personal computer’s hard drive or it may be stored remotely and accessed by the Internet. It is important that you keep a detailed list of all online accounts, as well as passwords, that you create. It is also vital that the list be updated as you create new accounts, change passwords, or begin conducting banking transactions or bill-paying over the Internet.

1. Please list all of your e-mail addresses and indicate what the e-mail address is used for (business or personal), as well as the password for those accounts.

E-mail Address	Type	Password

2. Do you conduct any banking or financial transactions online? If yes, please list each bank and brokerage account for which you have online access and indicate your username and password for each account. If you have a PayPal or other online purchasing account, list your username and password.

Account	User Name	Password

3. Please list the location of any computer that you currently have access to or use. This includes all of your personal and professional computers, tablets, notebooks and smart phones. Please identify the username and current password to access each device. If you have a password set up on the computer, please list the current password.

Device / Location	User Name	Password

4. Do you store your data on your computer's hard drive, on removable media (such as Flash memory cards or disks) or on a remote internet site? Please list where such data is stored and where the removable media is located and stored. If you use a remote internet site for storage, please list the site, as well as your username and password.

Data Storage / Location	User Name	Password

5. Are you signed up with any Internet-based service that manages accounts and passwords? If so, please list the site, as well as your account information and password.

Account	User Name	Password

6. Please list any physical location where you keep a current list of passwords for your accounts.

7. Please list all of your blogs, domain names and webpages and list the registrar/host for each. In the event of your death or disability, should these sites be continued? If so, how and by whom?

Blog/Domain Name/Web Page	Registrar/Host	Continue? Instruction
		<input type="checkbox"/> Yes <input type="checkbox"/> No <u>Instruction:</u>
		<input type="checkbox"/> Yes <input type="checkbox"/> No <u>Instruction:</u>
		<input type="checkbox"/> Yes <input type="checkbox"/> No <u>Instruction:</u>

8. If you take digital photos, please describe where you store your photos. If you use a photo sharing website, please list that website and provide your username and password for each site.

Storage Method	User Name	Password

9. Please list any other accounts or digital information that may be important or valuable (such as domain names that you own, bit coins or any other virtual currency that you possess). If relevant, describe what you would like to happen to that account or information if you die or become disabled.

Other Accounts	Account Information/Instructions

10. List the usernames and passwords to each of your social networking profiles such as LinkedIn, Facebook, and Twitter. In the event of your death or disability, should your profile be deleted? If not, who should be responsible for continuing your profile and what do you want them to do with it?

Social Media	User Name/Password	Continue? Instruction
		<input type="checkbox"/> Yes <input type="checkbox"/> No <u>Instruction:</u>
		<input type="checkbox"/> Yes <input type="checkbox"/> No <u>Instruction:</u>
		<input type="checkbox"/> Yes <input type="checkbox"/> No <u>Instruction:</u>

11. Please list any other online accounts or digital information that may be important or valuable. Please describe what you would like to happen to that account or information if you die or become disabled.

Other Accounts	Account Information/Instructions

12. Is there any sensitive information in online accounts listed above that should be kept secret from some of your family and friends? Yes No

If yes, how should that information be handled and by whom? _____

13. Please list where you keep important documents such as birth certificates, social security cards, marriage license etc. _____

14. Do you have a default method of assigning username and passwords? If so, what is the method?

15. Please provide the answer to secret questions often used in retrieving username and passwords.

Question	Answer
What is your mother's maiden name?	
What is your mother's middle name?	
What is your father's middle name?	
What high school did you attend?	
What was your high school mascot?	
What elementary school did you attend?	
In what city were you born?	
What was your first pet's name?	
What was the street name of your first home?	
What is your maternal grandfather's name?	
What was your first vehicle?	

Please be sure that all account information and passwords are kept in a secure location! Also, please be sure to update the information as passwords and accounts change. Lastly, each family member should provide information regarding user names and passwords on their devices and this information should be kept in a sealed envelope in a secure location.