

Digital Assets Inventory Worksheet

NAME _____ DATE _____

The Internet has become an increasingly significant part of our lives, and as a result many of us have accumulated “digital assets” that must be cared for and ultimately disposed of. 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 or social media, has a password-protected cell phone, makes online purchases, or pays bills online has digital assets.

This Worksheet is included with your estate planning documents in order to help you organize and record information about your digital assets. We recommend that you keep this Worksheet in a safe place and that you inform your Personal Representative and your Agent under Power of Attorney of its location, but you don’t need to give them a copy of it yet. Generally, we recommend that you keep records of your passwords in a separate location from this Worksheet in case it were somehow lost or compromised; however, you are free to include as much information here as you think necessary to help your fiduciaries. It’s probably best to keep this on paper only – the likelihood of a digital file being compromised is far greater than a piece of paper being shared widely.

If you use a separate service to record information about your digital assets such as Keepass, Lastpass or Dashlane, please make reference to the service on this Worksheet.

Lastly: don’t forget to review this information on occasion and make updates as necessary.

Electronic Devices (e.g. smartphone, laptop, desktop, tablet, external hard drive, flash drive)

Name of Device/Owner	Login Information

Email Accounts (e.g. Yahoo, Gmail, Outlook, AOL, Hotmail)

Name of Email Service Provider	Login Information

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 Account	Login Information

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

Name of Online Merchant	Login Information

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

Name of Publication Account	Login Information

Entertainment Accounts (e.g., Snapfish, Flickr, iTunes, Google Play, Steam, Twitch, YouTube, Vimeo)

Name of Entertainment Account	Login Information

Web Service Accounts (e.g., domain names, hosting services, online business accounts, and cloud storage sites such as Dropbox, Google Drive, Apple iCloud)

Name of Web Service Account	Login Information

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

Name of Social Media Account	Login Information

Benefit Accounts (e.g., airline miles, railroad miles, hotel rewards, retailer reward/loyalty programs)

Name of Benefit Account/Web Address	Login Information