

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 |
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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 |
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