

Digital estate audit checklist

Keep this information in a locked location to prevent fraud.

Your name: _____

Digital executor's name: _____

Password manager

List your master password manager account, such as LastPass, if applicable.

▶ Service	▶ Email address/username	▶ Password
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Personal devices

List all mobile devices and computers, both personal and work equipment.

▶ Device description	▶ Username	▶ Password
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Email

List personal and work accounts.

▶ Service

▶ Email address

▶ Password

Financials

List all your digital accounts including banking, investing, credit cards, budgeting services, retirement, life insurance and tax preparation. Also include cryptocurrency keys if applicable.

▶ Service

▶ Email address/username

▶ Password

Financials (continued)

▶ Service

▶ Email address

▶ Password

Utility and property services

▶ Company

▶ Account number

▶ Email/username

▶ Password

Utility and property services (continued)

▶ Company ▶ Account number ▶ Email/username ▶ Password

Social media

List all accounts, such as Facebook, LinkedIn and Instagram.

▶ Website ▶ Email address/username ▶ Password

Online storage

List all cloud-based storage accounts, such as Apple iCloud, Google Drive and Dropbox.

▶ Website

▶ Email address/username

▶ Password

Online shopping, subscriptions and services

List all accounts and apps, such as Amazon, HelloFresh, Etsy and Uber.

▶ Website

▶ Email address/username

▶ Password

Entertainment and media

List all accounts and apps, such as Apple iTunes, Hulu, Netflix and YouTube.

▶ Website

▶ Email address/username

▶ Password

Security systems

List properties for which you have security systems or codes, such as your primary home, vacation home(s) and business(es).

▶ Property description

▶ Property address

▶ Security company

▶ System password

Intellectual property and/or other specialty digital assets

List all patents, trademarks, copyrights, videos, photographs, images or presentations.

▶ Issue/Creation date ▶ Reference number ▶ Location ▶ Description

Domain names, websites and blogs

▶ Credit domain name and registrar/host ▶ Email address/username ▶ Password

Other online accounts and apps

List any accounts not already recorded, including P2P payment services such as PayPal and Venmo.

▶ Website

▶ Email address/username

▶ Password



Investment products and services are:

**NOT A DEPOSIT • NOT FDIC INSURED • MAY LOSE VALUE • NOT BANK GUARANTEED •
NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY**

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