



Digital Assets Resource Sheet

Please list any creditor, online retailer, bank or investment accounts you have electronic access to. This includes but may not be limited to: password managers, checking/savings accounts, investment accounts, loans, annuities/insurance policies, Savings Bonds/CDs, pensions/401(k)/403(b), employer/company sites, bill paying sites, credit cards and credit reporting agencies, and/or mobile wallet accounts (Paypal, Venmo, ApplePay, etc). This list should be kept in a secure location accessible only to you and the person you have selected as your "digital agent".

Institution: _____	Username: _____
Website: _____	Password: _____ As of date: _____
Type of Account: _____	Security Question 1: _____
Joint Owner (if applicable): _____	Security Question 2: _____
Credit Card on file? Yes ___ No ___	Set up for auto payments? Yes ___ No ___

Institution: _____	Username: _____
Website: _____	Password: _____ As of date: _____
Type of Account: _____	Security Question 1: _____
Joint Owner (if applicable): _____	Security Question 2: _____
Credit Card on file? Yes ___ No ___	Set up for auto payments? Yes ___ No ___

Institution: _____	Username: _____
Website: _____	Password: _____ As of date: _____
Type of Account: _____	Security Question 1: _____
Joint Owner (if applicable): _____	Security Question 2: _____
Credit Card on file? Yes ___ No ___	Set up for auto payments? Yes ___ No ___

Institution: _____	Username: _____
Website: _____	Password: _____ As of date: _____
Type of Account: _____	Security Question 1: _____
Joint Owner (if applicable): _____	Security Question 2: _____
Credit Card on file? Yes ___ No ___	Set up for auto payments? Yes ___ No ___

Institution: _____	Username: _____
Website: _____	Password: _____ As of date: _____
Type of Account: _____	Security Question 1: _____
Joint Owner (if applicable): _____	Security Question 2: _____
Credit Card on file? Yes ___ No ___	Set up for auto payments? Yes ___ No ___

Institution: _____ Username: _____
Website: _____ Password: _____ As of date: _____
Type of Account: _____ Security Question 1: _____
Joint Owner (if applicable): _____ Security Question 2: _____
Credit Card on file? Yes ___ No ___ Set up for auto payments? Yes ___ No ___

Institution: _____ Username: _____
Website: _____ Password: _____ As of date: _____
Type of Account: _____ Security Question 1: _____
Joint Owner (if applicable): _____ Security Question 2: _____
Credit Card on file? Yes ___ No ___ Set up for auto payments? Yes ___ No ___

Institution: _____ Username: _____
Website: _____ Password: _____ As of date: _____
Type of Account: _____ Security Question 1: _____
Joint Owner (if applicable): _____ Security Question 2: _____
Credit Card on file? Yes ___ No ___ Set up for auto payments? Yes ___ No ___

Institution: _____ Username: _____
Website: _____ Password: _____ As of date: _____
Type of Account: _____ Security Question 1: _____
Joint Owner (if applicable): _____ Security Question 2: _____
Credit Card on file? Yes ___ No ___ Set up for auto payments? Yes ___ No ___

Institution: _____ Username: _____
Website: _____ Password: _____ As of date: _____
Type of Account: _____ Security Question 1: _____
Joint Owner (if applicable): _____ Security Question 2: _____
Credit Card on file? Yes ___ No ___ Set up for auto payments? Yes ___ No ___

Institution: _____ Username: _____
Website: _____ Password: _____ As of date: _____
Type of Account: _____ Security Question 1: _____
Joint Owner (if applicable): _____ Security Question 2: _____
Credit Card on file? Yes ___ No ___ Set up for auto payments? Yes ___ No ___

Phone password: _____ Safe Code or Hidden Key: _____
Computer password: _____ Tablet password: _____

Digital Assets Resource Sheet

If you have any financial accounts (account view), account notifications or statements that are sent to your email, list those usernames and passwords below. Also, include any social networking site login information that is important to you (e.g. Facebook, Flickr, Snapfish).

<u>Username/Login</u>	(Personal or Business)	<u>Password</u>
_____		_____
_____		_____
_____		_____
_____		_____
_____		_____
_____		_____
_____		_____
_____		_____
_____		_____
_____		_____

You may have bookkeeping software on your computer, or online access as well. List login information for your computer or software application below: (i.e Windows login, Quicken/Quickbooks login, etc).

<u>Login</u>	<u>Password</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____