

File Number:

DIGITAL ASSETS INVENTORY



PERSONAL DETAILS OF ASSET HOLDER

TITLE:	MR	MRS	MISS	DR	OTHER _____
FULL NAME:					
ALSO KNOWN BY:					
FULL ADDRESS:					
DATE OF BIRTH					
NATIONAL INSURANCE NUMBER					
EMAIL ADDRESS					

DIGITAL ASSETS

TYPE OF DIGITAL ASSET AND NAME OF ORGANISATION	LOCATION OF ACCESS INSTRUCTIONS (E.g. Safe deposit box)	USERNAME	ADDITIONAL DETAILS
ONLINE ACCOUNTS WITH UNDERLYING ASSETS			
Bank accounts			
1)			
2)			
3)			
4)			
Investment accounts			
1)			
2)			
3)			
Crypto-currency			
Other			
GOVERNMENT OR INSURANCE ACCOUNTS			
Social security/Medicare			
Health Insurance			
Property Tax			
Other			

CLOUD-BASED PAYMENT ACCOUNTS			
PayPal			
Venmo			
Stripe			
Other			
CLOUD-BASED APPLICATIONS			
Microsoft Office 365			
Quicken/QuickBooks/Turbo Tax			
Other			
CREDIT CARDS			
Visa			
Mastercard			
American Express			
Other			
MERCHANT ACCOUNTS			
Amazon			
eBay			
Netflix			
Other			
EMAIL PROVIDERS			
Gmail			
Yahoo			
Outlook/Hotmail			
AOL			
Other			

IM/CHAT SERVICES AND SOCIAL MEDIA			
Skype			
WhatsApp			
Facebook			
Twitter			
Tumblr			
LinkedIn			
Google+			
Instagram			
Pinterest			
FREQUENT FLYER AND LOYALTY ACCOUNTS			
Airlines			
Rental cars			
Hotels			
Stores			
Other			
PHOTOGRAPHY, MUSIC AND VIDEO			
Flickr			
YouTube			
Vimeo			
iTunes			
Hulu			
Spotify			
GAMING ACCOUNTS			
Other			

ONLINE STORAGE			
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iCloud			
Google Drive			
Dropbox			
MS One Drive			
Other			

PASSWORD MANAGER			
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Other			
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HOME AND PERSONAL SERVICES			
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Nest			
ADT			

OTHER ACCOUNTS			
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DIGITAL DEVICES

TYPE OF DEVICE	LOCATION OF ACCESS INSTRUCTIONS (E.g. Safe deposit)	USERNAME	ADDITIONAL DETAILS
HARDWARE			(Make, Model, serial number, location, applications on device, cloud back-ups, contracts/leases)
PC			
Laptop			
Tablet/iPad			
Smartphone			
Other			

SOFTWARE			(Location of disk and/or licence details, devices installed on, verification information)
Microsoft Office			
Apple iOS			
Windows			
Other			
FILE STORAGE DEVICES			(Make, model, capacity)
External Hard Drive			

TYPE OF ASSET	GUIDANCE NOTES
Email accounts	Which email address is used for username or password recovery? Does the account have security questions associated with it? Is the address linked to another service account (e.g. TV/Internet provider - include details)?
Social media	Is the screen name different from the account holder's legal name (provide details)? Have instructions been given via Facebook Legacy for the account to be deleted or memorialized? Are any accounts linked with the holder's employment? What are the privacy settings?
IM/Chat services	Do you generate or receive royalties (i.e. followers or ad revenue)? Is the service accessed via a website or applicable on a mobile device?
Online accounts with underlying assets	What is the website address? What are the account numbers? Is anyone else authorised to access the account? What is the contact for the holder's personal banker or investment adviser? What wallet providers are used to hold any crypto-currencies? Where are the public and private keys stored for crypto-currencies?
Government of insurance accounts	What is accessed through the account (e.g. government pension statements)? Does the holder have a Patient Portal with his/her health care provider? Does the holder have an online account with his/her property/auto insurance provider?
Cloud based payment services	Are there bank accounts/credit cards linked to the account? Is a balance ordinarily kept in the online account?
Merchant accounts	Is the account for personal purchases or revenue generation? Is the account linked to a payment services account (e.g. PayPal)?
Frequent flyer/loyalty accounts	What are the underlying account numbers? Are the points transferable during life or upon death?
Photography, music and video	Location of favourite/sentimental photos (e.g. specific folders)? Are royalties received or other revenue generated from any photo, video or music service? Can purchases be assigned to another account?
Gaming accounts	Who is the provider? What is the holder's screen name/username (if different to legal name)? Are royalties received or other revenue generated from any gaming sites (e.g. ad revenue)?
Online storage	What is the type of data stored? What is the purposes of the data stored? Is the information encrypted and if so who has the key?
Password manager	Has the master password been secured in a safe place? Have secondary ID procedures been set up in case the master password cannot be located?
Home and personal services	Who is the backup authorised person with access codes? Are any household appliances associated with online accounts? Does the holder have accounts associated with postal deliveries (e.g. FedEx)