

Digital Asset Worksheet

This worksheet is designed to help you organize important information about your digital life. It is for your personal use and does not replace the advice of an attorney or other qualified professional.

Privacy reminder: Consider where you keep this worksheet and who will have access to it. Many people complete a worksheet like this and then discuss the best way to store and share it with an attorney, trusted advisor, or fiduciary as part of a broader estate plan.

Name

Date

Primary Contact / Fiduciary

Where I Intend to Store This Worksheet

Section 1 – Financial & Bill-Paying Accounts

Please list online banking, investment, credit card, and bill-paying accounts.

Account 1

Institution / Service Name

Website / App

Username / ID

Where Credentials Are Stored

Notes (auto-pay, important details, etc.)

Account 2

Institution / Service Name

Website / App

Username / ID

Where Credentials Are Stored (e.g., password man-

Notes (auto-pay, important details, etc.)

Section 2 – Email, Social Media & Communication

List important email addresses, social media profiles, and messaging platforms.

Account 1

Service (e.g., Gmail, Facebook,

Username / Handle

Profile / Login Link

Where Credentials Are Stored

Notes (e.g., legacy contact settings)

Section 3 – Photos, Videos & Creative Work

Use this section to describe where your important memories and creative projects are stored.

Photo / Video Library

Service / Device (e.g., iCloud Photos)

Physical or Online Location

Notes (backup details, albums of special importance, etc.)

Other Digital Files / Creative Projects

Describe any writings, recordings, websites, or other work stored digitally and where they can be found.

Section 4 – Additional Instructions or Notes

Describe any writings, recordings, websites, or other work stored digitally and where they can be found.