

MANAGE YOUR DIGITAL ESTATE

DIGITAL ACCOUNTS WORKSHEET

Your emails, social media accounts, and entertainment purchases are all part of your digital estate. This worksheet can help manage the services you use, so they don't disappear, get deleted, or become useless after you're gone (unless that's your intention).

REMEMBER

Because this completed document will contain sensitive, personal information, consider storing it in a secure location and share details only with the people you trust.

UNLOCK/ACCESS CODE:

PHONE	<input type="text"/>
COMPUTER	<input type="text"/>
TABLET	<input type="text"/>
OTHER	<input type="text"/>



If a phone has a fingerprint scanner, consider registering the print of someone you trust.

PASSWORD MANAGER

Even if you don't use a password manager, you may want to let a trusted loved one know where you keep your passwords (e.g., in a Word document on your laptop).

PASSWORD MANAGER SERVICE	<input type="text"/>
LOGIN	<input type="text"/>
NOTES AND INSTRUCTIONS	<input type="text"/>
OTHER METHOD OF STORING YOUR PASSWORDS	<input type="text"/>



TRANSAMERICA®

EMAIL

PROVIDER	
LOGIN	
INSTRUCTIONS	
PROVIDER	
LOGIN	
INSTRUCTIONS	
PROVIDER	
LOGIN	
INSTRUCTIONS	
OTHER/NOTES	



Access to email is the holy grail of digital estate planning.

It can allow your family or executor to close or transfer accounts with the least amount of hassle.

PAYMENT/MONEY MANAGEMENT ACCOUNTS

(EXAMPLE: Venmo®)

SITE	
LOGIN	
INSTRUCTIONS	
SITE	
LOGIN	
INSTRUCTIONS	
OTHER/NOTES	



Money associated with a payment or investment account (E-Trade®, etc.) needs to be officially rolled into the estate like all other financial assets.

It's up to the executor to make sure this happens correctly.

SOCIAL MEDIA ACCOUNTS

SITE	
LOGIN	
INSTRUCTIONS	
SITE	
LOGIN	
INSTRUCTIONS	
OTHER/NOTES	



Facebook is among companies allowing you to name someone to have limited access to your account after you're gone.

If you're a regular Facebook user, do a search for "legacy contact," and name someone today.

CLOUD STORAGE ACCOUNTS

SERVICE	
LOGIN	
INSTRUCTIONS	
SERVICE	
LOGIN	
INSTRUCTIONS	
OTHER/NOTES	




Consider setting aside time to organize your files.

It will save your family from being overwhelmed by thousands of photos, videos, and other random things you automatically back up.

BLOGGING/WEB HOSTING ACCOUNTS & SERVICES

SITE/SERVICE	
LOGIN	
INSTRUCTIONS	
SITE/SERVICE	
LOGIN	
INSTRUCTIONS	
OTHER/NOTES	

 Give your family or executor specific instructions for domains or blogs you created that you want to live on after you're gone.

SOFTWARE LICENSES

(EXAMPLES: TurboTax®, antivirus software)

COMPANY	
LOGIN	
INSTRUCTIONS	
COMPANY	
LOGIN	
INSTRUCTIONS	
OTHER/NOTES	

FOOD/DELIVERY SERVICES

SERVICE	
LOGIN	
INSTRUCTIONS	
SERVICE	
LOGIN	
INSTRUCTIONS	
OTHER/NOTES	

ENTERTAINMENT

VIDEO STREAMING ACCOUNTS


SERVICE	
LOGIN	
INSTRUCTIONS	
SERVICE	
LOGIN	
INSTRUCTIONS	
OTHER/NOTES	

MUSIC ACCOUNTS

SERVICE	
LOGIN	
INSTRUCTIONS	
SERVICE	
LOGIN	
INSTRUCTIONS	
OTHER/NOTES	

GAMING

SERVICE	
LOGIN	
INSTRUCTIONS	
SERVICE	
LOGIN	
INSTRUCTIONS	
OTHER/NOTES	

 If you share any of these entertainment accounts with family members, make sure they have the login information.

This way, they don't lose all their lists and favorites.

TRAVEL/TICKETING/REWARDS

(EXAMPLES: airline, rental car, casino rewards)

AIRLINE	
FREQUENT FLYER #	
INSTRUCTIONS	

RENTAL CAR	
MEMBER #	
INSTRUCTIONS	

COMPANY	
LOGIN INFO	
INSTRUCTIONS	

OTHER/NOTES	
-------------	--

! Some frequent flyer miles or hotel reward points can be transferred to heirs if you contact the customer service center.

It's not a guarantee, but it's definitely worth a shot.

MESSAGING SERVICES

USERNAME	
PHONE #	
INSTRUCTIONS	

USERNAME	
PHONE #	
INSTRUCTIONS	

OTHER/NOTES	
-------------	--

NOTES

This material is for informational purposes and should not be construed as legal or tax advice. For legal or tax advice concerning your situation, please consult your attorney or tax professional.

