
LIST OF USER NAMES & PASSWORDS/PINs

for

Date Completed / Updated: _____

NOTICE: The information you provide on this List will allow your fiduciaries to access your online accounts and digital property. "Fiduciaries" include your financial power of attorney, in the event you become incapacitated, and your executor (personal representative) who will handle your estate. It is important that you keep all information in the List up to date.

This information is highly sensitive, therefore, it must be carefully protected. An electronically filled in List should be encrypted and password protected, whether maintained on your computer hard-drive, a flash drive, or on a secured Cloud location.

ONLINE ACCOUNTS AND DIGITAL PROPERTY

Digital Data Item Suggestions

This page of digital data items is provided as a reference when entering the URLs (web addresses), user names, and passwords/PINs. (These suggestions are not all inclusive.)

CELL PHONE / TABLET

- Apple ID
- Data Provider

COMPUTER RELATED

- Computer
- Computer Backup Files

CORPORATE COMPENSATION & BENEFIT PLANS

- 401(k) Plan
- Deferred Compensation Plan
- Health Savings Account
- Restricted Stock
- Spending Accounts
- Stock Options

CRYPTOCURRENCY

- Cryptocurrency-Wallet

DIGITAL PHOTOGRAPHS & VIDEOS

DIGITAL STORAGE

- Cloud
- Drop Box

EDUCATION RELATED

- 529 Plans
- Education Certificates

ELECTRONIC PASSWORD MANAGEMENT TOOL/APP/SITE

EMAIL ACCOUNTS

ENTERTAINMENT / GAMING / MUSIC APPS

- Hulu / Netflix / etc.
- PlayStation / Xbox / etc.
- iTunes / Pandora / etc.

ESTATE INFORMATION

- Living Will / DNR Order
- Powers of Attorney
- Wills
- Trusts
- Estate Organizer
- Instructions Regarding Final Arrangements

FAMILY RELATED

- Birth Certificates
- Family Legacy Items
- Marriage License

FINANCIAL RELATED

- Banking / ATM Cards
- Cash Management Software
- Credit Cards
- Credit Monitoring Services
- Investment Accounts – Non Retirement
- Investment Accounts – Retirement

HEALTH CARE RESOURCES

- Alternative Health Care
- Chiropractor
- Dentist
- Primary Physician
- Pediatrician
- Specialist Physician

HOME MAINTENANCE

- Electricity / Gas
- Internet / Cable
- Phone
- Trash
- Water

INSURANCE COVERAGES

- Health Care
- Medicare
- Medicare Supplemental
- Automobile
- Homeowners
- Personal Umbrella
- Disability
- Life
- Long-term Care

INTELLECTUAL PROPERTY

- Copyrighted Publications
- DeviantArt
- YouTube
- Vimeo

LEISURE/RECREATION ACTIVITIES

- Museums
- Sport Events
- Symphony
- Theaters

ONLINE MERCHANTS

PET CARE

- Grooming
- Kennel
- Veterinarian

PROFESSIONAL ACCREDITATIONS

PROFESSIONAL ORGANIZATIONS/SERVICES

- Professional Organizations
- Notary

PROPERTY TITLES

- Residence
- Vacation Home
- Automobiles

RELIGIOUS AFFILIATIONS

REWARD PROGRAMS

- Airlines
- Credit Cards
- Hotels

SERVICE ORGANIZATIONS

- Rotary

SOCIAL NETWORKING SITES

- Facebook
- Instagram
- LinkedIn
- TikTok
- Twitter

SOCIAL SECURITY

TAX INFORMATION

- Tax Preparation Software
- Income Tax Records
- Gift Tax Records

WEBSITE & DOMAIN NAME

- Website & Domain Name
- Registration

