

APPENDIX – DIGITAL ESTATE INFORMATION SAMPLE FORM¹

DIGITAL ESTATE INFORMATION

I. LOCATIONS OF HARD COPY FILES AND MEDIA BACKUP

Personal records =

Financial =

Home/apartment records =

Media backups =

The location of traditional paper records as well as where back ups of digital information are stored is very helpful.

II. DEFAULT INFORMATION

User names =

Passwords =

Secret questions:

 Mother's maiden name =

 Grade school =

 Street where grew up =

Many clients have default information which they use for many accounts. If no specific access information is provided, this at least provides a starting point.

Some clients may also have a method of assigning passwords. If so, the client should provide this information.

¹ For another sample form, see James D. Lamm, [Digital Audit: Passwords & Digital Property](#) (2012).

III. ELECTRONIC DEVICE ACCESS

<u>Device</u>	<u>Website</u>	<u>Username</u>	<u>PIN</u>	<u>Password</u>
Computer – home				
Computer – office				
Operating System				
Voice mail – home				
Voice mail – work				
Voice mail – cell phone				
Security system				
Tablet				
e-Reader				
GPS				
Router				
DVR/TiVo				
Television				

IV. E-MAIL ACCOUNTS

<u>Description</u>	<u>E-mail address</u>	<u>Username</u>	<u>PIN</u>	<u>Password</u>	<u>Disposition Desires</u>
Work					
Home					
School					

V. DOMAIN NAMES

<u>Website/Domain Name</u>	<u>Webhost</u>	<u>Username</u>	<u>PIN</u>	<u>Password</u>
Personal				
Business				

VI. ON-LINE STORAGE

<u>Name</u>	<u>Website</u>	<u>Username</u>	<u>PIN</u>	<u>Password</u>
Dropbox				
Google Drive				

VII. FINANCIAL SOFTWARE

<u>Item</u>	<u>Website</u>	<u>User Name</u>	<u>PIN</u>	<u>Password</u>
Quicken				
TurboTax				

VIII. BANKING

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>ATM PIN</u>	<u>Security Image</u>
Checking					
Savings					
PayPal					

IX. STOCKS, BONDS, SECURITIES

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>

X. INCOME TAXES

<u>Item</u>	<u>Website</u>	<u>User Name</u>	<u>PIN</u>	<u>Password</u>
Federal Income tax payment	https://www.eftps.com/eftps/			
State Income tax payment				
Prior computerized tax returns				

XI. RETIREMENT

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>

XII. INSURANCE

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>
Health				
Life				
Property				

XIII. CREDIT CARDS

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>PIN</u>
American Express				
Visa				

XIV. DEBTS

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>
Mortgage				
Cars				
Student Loan				

XV. UTILITIES

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>
Electric				
Gas				
Internet				
Phone(landline)				
Phone (cell)				
TV				
Trash				
Water				

XVI. BUSINESSES

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>
Amazon.com				
e-Bay.com				

XVII. SOCIAL NETWORKS

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Disposition Desires</u>
Facebook				
LinkedIn				
Twitter				
MySpace				

XVIII. DIGITAL MEDIA ACCOUNTS

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>
Netflix				
iTunes				
YouTube				
Hulu				
Nook				
Kindle				

XIX. LOYALTY PROGRAMS

<u>Name</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>
Delta			
Southwest Airlines			
Best Buy			
Office Depot			

XX. OTHER ACCOUNTS

<u>Name</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>
Skype			
LoJack			
WoW			
HalfLife			
Flickr			
Medical records			