How to effectively document your digital life to provide a road-map for others who must assist you if you are not available to do so.*

1) Prepare a list of all of your on-line and off-line accounts. These should include:
   a. Bank Accounts,
   b. Safe Deposit Accounts
   c. Social Security Card
   d. Driver's License
   e. Birth Certificate
   f. Safes
   g. Hidden Assets
   h. Foreign Accounts
   i. Credit Cards
   j. Investments including IRA, Pension, 401K, Bonds, Social Security,
   k. PayPal account(s)
   l. Auto loans / Auto Leases
   m. All E-mail accounts
   n. Social Media Accounts – Facebook, Twitter, LinkedIn, etc.
   o. On-Line hosting accounts
   p. Cloud Storage Accounts
   q. Cloud Backup Accounts
   r. Local Backup Devices
   s. Medical Accounts
   t. Insurance Accounts
   u. Mobile Phone Accounts
   v. Cable Accounts
   w. Merchant Accounts
   x. Web Merchants such as Amazon, etc.
   y. Off-Site Physical Storage locations
   z. Router configuration and password information
   aa. Photographs
   bb. Miscellaneous
2) For all of the above, provide contact names, phone numbers, mailing addresses, expiration dates, approximate balances, account numbers, pin numbers, credit card numbers, Social Security Number, etc.
3) For electronic devices such as smart phones, tablets, PC's, Notebooks, etc. provide login credentials including username and password to gain access. If using scanning ID's be certain to

provide a secondary method of access – (i.e. password or Pin number). Provide instructions for any special encryption software being used that has additional password protection.

4) To aid in the management of the account info, utilize an encrypted password management tool such as RoboForm or Dash lane to store and recall this detailed info. RoboForm supports "Safe notes" that are encrypted and provide space to document and save this information. Be certain to document the Master Password for this software so that it can be accessed.
5) List all Software that helps you manage your financial information. Quicken, QuickBooks, Excel, etc. may assist a tax preparer in reporting your tax filings.
6) Identify all keys, combinations, pin codes, security codes for your info.
7) Mortgage information
8) Rental Agreements
9) Contractual Agreements
10) Accounts Receivable – approximate balances
11) Accounts Payable-approximate balances
12) Recurring automatic monthly charges
13) Recurring regular quarterly / annual charges
14) File Cabinets and contents
15) Names and Contact information of those you must inform /acknowledge
16) CPA
17) Attorney
18) IT Consultant
19) Primary Care Provider
20) Investment Advisor(s)
21) Employer
22) Partner(s)
23) Organization(s)
24) Religious Organizations (Church, Synagogue, etc.)
25) Living Will information / Organ Donor Card
26) Will and related documents
27) Final Resting Place orders and Arrangements
28) Final Wishes
29) Video or other recording of your final wishes

Use a 3-Ring Binder to assemble this information and place this index in the front as a guide. Check off each of the above line items to provide documentation that you have addressed each of these areas.

*This is NOT a legal document. Please consult your Legal Counsel for questions related to any matter referenced within. For compilation assistance or technology questions related to anything on this checklist, please contact:

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