



Digital Assets
SPECIAL INTEREST GROUP

Inventory for Digital Assets and Digital Devices

This document has been prepared to assist you in making a complete inventory of your digital assets and digital devices. We recommend that you maintain access instructions (which include passwords and PINS) completely separate from this inventory, and use this inventory to identify the location of those access instructions. It is designed to be independent of jurisdictional detail, so that you may use it regardless of jurisdiction location.

Appendix I and II provide relevant questions that will help you identify important details that should be considered and documented for each digital asset and digital device.

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- Specific questions to assist you in identifying important details about your Digital Devices

Section 1: Digital Assets Inventory



Digital Assets
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Digital Asset	Username	Location of Access Instructions; i.e. Safe Deposit Box	Additional Details see Appendix I for assistance in completing this column
EMAIL PROVIDER			
Gmail			
Yahoo			
Outlook/Hotmail			
AOL			
Other			
SOCIAL MEDIA SERVICE			
Facebook			
Instagram			
Google+			
LinkedIn			
Pinterest			
Twitter			
Tumblr			
Other			
IM/CHAT SERVICES			
AOL Instant Messenger			
Google Hangout			
Skype			
GoToMeeting			
WhatsApp			
Yahoo Messenger			
Web/Ex			
Other			

Do not include passwords, security question answers or PIN numbers on the inventory list. Only include information on the physical location of access instructions.

Section 1: Digital Assets Inventory *continued*



Digital Assets
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Digital Asset	Username	Location of Access Instructions; i.e. Safe Deposit Box	Additional Details see Appendix I for assistance in completing this column
ONLINE ACCOUNTS WITH UNDERLYING ASSETS			
Bank Accounts			
Investment Accounts			
Cryptocurrency Accounts			
Other			
GOVERNMENT OR INSURANCE ACCOUNTS			
Social Security/Medicare Accounts			
Health Insurance Provider			
Property/Auto Insurance			
Property Tax			
Other			
CLOUD-BASED PAYMENT ACCOUNTS			
PayPal			
Venmo			
Stripe			
Other			
CLOUD-BASED APPLICATIONS			
Microsoft Office 365			
Quicken/QuickBooks/TurboTax			
Other			
CREDIT CARDS			
VISA			
Master Card			
American Express			
Other			

**Do not include passwords, security question answers or PIN numbers on the inventory list.
Only include information on the physical location of access instructions.**

Section 1: Digital Assets Inventory *continued*



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Digital Asset	Username	Location of Access Instructions; i.e. Safe Deposit Box	Additional Details see Appendix I for assistance in completing this column
MERCHANT ACCOUNTS			
Amazon			
eBay			
Netflix			
Other			
FREQUENT FLYER & LOYALTY ACCOUNTS			
Airlines			
Rental Cars			
Hotels			
Stores			
Other			
REVENUE GENERATING WEBSITES & DOMAINS			
PHOTOS/VIDEOS			
Instagram			
Flickr			
Shutter Fly			
You Tube			
Vimeo			
Other			
MUSIC/EBOOKS/VIDEO STREAMING			
Amazon			
iTunes			
Hulu			
Netflix			
Pandora			
Spotify			
Other			

**Do not include passwords, security question answers or PIN numbers on the inventory list.
Only include information on the physical location of access instructions.**

Section 1: Digital Assets Inventory *continued*



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Digital Asset	Username	Location of Access Instructions; i.e. Safe Deposit Box	Additional Details see Appendix I for assistance in completing this column
GAMING ACCOUNTS			
ONLINE STORAGE			
iCloud			
Google Drive			
Carbonite			
Dropbox			
MS One Drive			
Other:			
PASSWORD MANAGER			
LastPass			
True Key			
1Password			
Other:			
HOME AND PERSONAL SERVICES			
NEST			
ADT			
OTHER ACCOUNTS			

Do not include passwords, security question answers or PIN numbers on the inventory list.
Only include information on the physical location of access instructions.

Section 2: Digital Devices Inventory

Digital Device	Username	Location of Access Instructions; i.e. Safe Deposit Box	Additional Details see Appendix II for assistance in completing this column
HARDWARE			Details include: Make, model, serial number, locations, locators for the device, applications on device, cloud back-ups, contracts/leases
Computer			
Laptop			
Tablet/iPad			
Smartphone/iPhone			
Storage Devices			
Other			
SOFTWARE INSTALLED ON HARDWARE			Details include: Location of disk and/or licence details, devices installed on, verification information
Microsoft Office			
Apple IOS			
Windows			
Other			
FILE STORAGE DEVICES			Details include: Make, model and capacity of storage device
External Hard Drive			

Do not include passwords, security question answers or PIN numbers on the inventory list. Only include information on the physical location of access instructions.

Section 3: Appendix I – Digital Assets Detail



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Digital Asset	Questions to help you complete the detail column
EMAIL PROVIDER	
Gmail	Which e-mail account(s) do you use most often?
Yahoo	
Outlook/Hotmail	Which email account(s) do you use for username/password recovery or reset?
AOL	
Other:	<p>Does the email account have security questions associated with it? Include the security question answers with your passwords located separately from this Inventory.</p> <p>Does it require two-step authentication? Is the security code sent via email or text?</p> <p>What is the website address you use to access the email account?</p> <p>Is the e-mail account provided by an Internet Service Provider, Cell Service Provider or Cable TV account?</p> <p>If you use an e-mail account that is linked to another service account (like cable TV), list that account with your email information.</p>
SOCIAL MEDIA SERVICE	
Facebook	<p>Is your screen name or user name different from your legal name? Add screen name or user name or short names for social media sites that are different from your legal name.</p> <p>Have you given instructions via Facebook Legacy or Google Ad</p> <p>Do you generate revenue or receive royalties from any social media services?</p> <p>Have you given specific instructions on how you would like your social media site memorialised?</p> <p>Are any of these social media sites connected with your employment?</p> <p>What are the privacy settings on the accounts? Is your profile open to the world or just a selected community or family/friends?</p>

Section 3: Appendix I – Digital Assets Detail *continued*

Digital Asset	Questions to help you complete the detail column
IM/CHAT SERVICES	
AOL Instant Messenger	Is the screen name or user name or short names or character name different from your legal name?
Google Hangout	
Skype	Do you generate revenue or receive royalties, i.e. followers or ad revenue?
GoToMeeting	
WhatsApp	How do you access this service, via a website or an application on a mobile device?
Yahoo Messenger	
Web/Ex	
Other	
ONLINE ACCOUNTS WITH FINANCIAL INSTITUTIONS	
Bank Accounts	What is the name and website address of the financial institution?
Investment Accounts	What is the underlying account number(s)?
Cryptocurrency Accounts	Do you also receive paper statements?
	Is another person authorized to access the account?
	What is the contact information for banker or investment advisor?
	Which cryptocurrencies do you own?
	Which wallet providers are you using to hold the cryptocurrencies?
	Have you included a copy of your public and private keys with your other Digital Asset access instructions?
GOVERNMENT OR INSURANCE ACCOUNTS	
Social Security/Medicare	What is the purpose of the account and what do you access through it, i.e. government pension statements or senior pension information or government services?
Health Insurance Provider	
Property/Auto Insurance	
Property Tax	Are there any specific accounts where you receive information on taxes or any other interaction you have to secure your home or family with government?

Section 3: Appendix I – Digital Assets Detail *continued*

Digital Asset	Questions to help you complete the detail column
GOVERNMENT OR INSURANCE ACCOUNTS <i>continued</i>	
	<p>Do you have a Patient Portal with your health care provider?</p> <p>Have you authorised someone to have access to health care information?</p> <p>Do you have an online account with your property or auto insurance provider?</p>
CLOUD-BASED PAYMENT SERVICES	
PayPal	Do you have bank accounts or credit cards linked to the payment account?
Venmo	Do you keep a balance in the online account?
Stripe	
Other	
CREDIT CARD ACCOUNTS	
VISA	What is the name and website address of the financial institution?
Master Card	What is the underlying account number(s)?
American Express	
Other	Do you also receive paper statements?
	Is another person authorized to access the account?
MERCHANT ACCOUNTS	
Amazon	Is the account for personal purchases or revenue generation?
eBay	Is there an associated online account (i.e. PayPal) where you transact purchases and returns?
Netflix	
Other	
FREQUENT FLYER & LOYALTY ACCOUNTS	
Airlines	What is the name and website address of the company?
Rental Cars	What is the underlying account number(s)?
Hotels	
Stores	Do you also receive paper statements?
	Is another person authorized to access the account?
	Are the points transferable during life or upon death?

Section 3: Appendix I – Digital Assets Detail *continued*

Digital Asset	Questions to help you complete the detail column
REVENUE GENERATING WEBSITES & DOMAINS	
	<p>What is the registration account number/owner name?</p> <p>Who did you buy the domain(s) from? When does it expire?</p> <p>What company manages the domain(s)?</p> <p>Are there associated IM/Chat Services used to generate revenue or receive royalties, i.e. followers / ad revenue</p>
PHOTOS/VIDEOS	
Instagram	<p>What is the location of your favorite or sentimental or family legacy photos; i.e. specific folder, online storage or external device</p> <p>Do you generate revenue or receive royalties from any photo or video service?</p>
Flickr	
Shutter Fly	
You Tube	
Vimeo	
Other	
MUSIC/EBOOKS/VIDEO STREAMING	
Amazon	<p>Do you generate revenue or receive royalties from any streaming service you use to (i.e. book self-publishing)</p> <p>Are you able to transfer/assign purchased music/eBooks/videos to another account?</p>
iTunes	
Hulu	
Netflix	
Pandora	
Spotify	
Other	
GAMING ACCOUNTS	
	<p>What is your screen name or user name or short names or character name if gaming account name is different from your legal name?</p> <p>Do you generate revenue or receive royalties from any gaming sites i.e. followers /Ad revenue?</p> <p>Are there any gaming accounts that have an online account used to pay for services and are you able to transfer/assign to someone else?</p>

Section 3: Appendix I – Digital Assets Detail *continued*

Digital Asset	Questions to help you complete the detail column
ONLINE STORAGE	
ICloud	What is the on-line account information associated with these on-line storage providers?
Google Drive	
BOX	
Dropbox	What is the type of data and the purpose for the information that is stored on these on-line storage providers?
MS One Drive	
Other	
Is the information encrypted? Who has the encryption key?	
PASSWORD MANAGER	
LastPass	Have you secured the master password in a safe place given that it is generally unrecoverable?
True Key	
1Password	
Other	Have you set up secondary ID procedures to enable you to access the account if you lose the master password?
HOME AND PERSONAL SERVICES	
NEST	Do you have a Home security system?
ADT	
	Do you have a backup authorised person who has the access codes?
	Do you have household appliances with associated on-line accounts?
	Do you have online accounts associated with package delivery i.e. FedEx, UPS
OTHER ACCOUNTS	

Section 4: Appendix II – Digital Device Detail

Digital Device	Type of Digital Device	Questions to help you complete the Detail Column
HARDWARE	Desktop Computer, Laptop Computer Tablet/iPad Smart phones	Does any device require 2-step authentication to access? Which account is associated with each hardware device, for example, an iPhone would have an Apple ID? Have you tested the instructions to your access to hardware devices, often you will find there is yet another PIN or password or secret word required which should be captured in your access instructions?
SOFTWARE INSTALLED ON HARDWARE		List only software physically installed on computer, Smartphone, Tablet/iPad. Cloud based subscription software will be under online accounts.
Operating Systems	Windows Operating system Apple IOS	What is the most current version?
Applications		
	Microsoft Office	Is there an associated Cloud Account?
	Quicken/QuickBooks/Turbo Tax	Is there an associated Cloud Account?
	Virus, malware, or firewall software	
	Virtual Private Network software	
FILE STORAGE DEVICES	External Hard Drive	Where have you physically secured the storage device, where is it locked up when not in use? Have you logically secured the data on the storage device - is the device encrypted?