



Digital Assets and Devices

DEVICES

☐ Phone	Unlock/Access Code: _____
☐ Computer	Unlock/Access Code: _____
☐ Tablet	Unlock/Access Code: _____
☐ Other	Unlock/Access Code: _____

PASSWORD MANAGER

Even if you don't use a password manager, you should still include where you keep your passwords in the "Notes & Instructions" field below (Example: Word document on your laptop.)

☐ Service: _____	Login Info: _____
Notes & Instructions: _____	

EMAIL

(**Most Popular:** Gmail, Yahoo, Outlook, work-based, personally hosted)

☐ Provider: _____	Login: _____
_____	Instructions: _____

☐ Provider: _____	Login: _____
_____	Instructions: _____

☐ Provider: _____	Login: _____
_____	Instructions: _____



☐ Other/Notes:

SOCIAL MEDIA

(Most Popular: Facebook, Twitter, LinkedIn, Instagram, Pinterest)

☐ Site: _____ Login: _____

Instructions: _____

☐ Site: _____ Login: _____

_____ Instructions: _____

☐ Other/Notes: _____

SHOPPING

(Most Popular: Amazon, Ebay, Etsy)

☐ Site: _____ Login: _____

Instructions: _____

☐ Site: _____ Login: _____

_____ Instructions: _____

☐ Other/Notes: _____



PAYMENT/MONEY MANAGEMENT ACCOUNTS

(**Most Popular:** PayPal, Venmo, Google Wallet, Mint)

☐ Site: _____ Login: _____

Instructions: _____

☐ Site: _____ Login: _____

_____ Instructions: _____

☐ Other/Notes: _____



CLOUD STORAGE ACCOUNTS

(Most Popular: Dropbox, iCloud, Microsoft OneDrive, Box)

☐ Service: _____ Login: _____

Instructions: _____

☐ Service: _____ Login: _____

_____ Instructions: _____

☐ Other/Notes: _____

VIDEO STREAMING ACCOUNTS

(Most Popular: Netflix, Hulu, Amazon Prime, Disney+)

☐ Service: _____ Login: _____

Instructions: _____

☐ Service: _____ Login: _____

_____ Instructions: _____

☐ Other/Notes: _____

MUSIC ACCOUNTS

(Most Popular: Apple Music, Spotify, Pandora)

☐ Service: _____ Login: _____

_____ Instructions: _____



Heritage
Trust

☐ Service: _____ Login:

_____ Instructions:

☐ Other/Notes:



FOOD/DELIVERY SERVICES

(Most Popular: Costco, Fresh Direct, Seamless)

☐ Service: _____ Login: _____

_____ Instructions: _____

☐ Service: _____ Login: _____

_____ Instructions: _____

☐ Other/Notes: _____

TRAVEL/TICKETING/REWARDS

(Example: Airline, rental car, casino rewards, Uber, Ticketmaster)

☐ Airline: _____ Frequent Flyer #: _____

_____ Instructions: _____

☐ Rental Car: _____ Member #: _____

_____ Instructions: _____

☐ Company: _____ Login Info: _____

_____ Instructions: _____

☐ Other/Notes: _____



MESSAGING SERVICES/VOIP

(Most Popular: Zoom, WhatsApp, Snapchat) Username:

☐

Phone

#: _____

Instructions:

Username: _____ Phone #: _____

Instructions:
