

# Digital asset inventory

---

**Table of contents**

Getting started	2
Banking, investments and insurance information	3
Electronic devices and storage	5
Social and on-demand digital media	7
Other	8

---

## Creating an inventory of your digital assets can help protect your wealth

Whether checking in on your investments, making purchases or keeping in touch with friends, using digital channels and tools is essential to how we work, socialize and manage our lives. With so many digital interactions, it's easy to amass dozens of digital assets — online accounts, photos, financial documents — over time. But what will happen to those digital holdings if you should die or become incapacitated?

Preparing a digital roadmap for your family and others to locate and access all of your important digital assets can help ensure that valuables don't get overlooked or lost. This worksheet is interactive, allowing you to customize it to your inventory and create a record of your digital wealth. It includes examples in each section to help guide the information you may want to include, and there is space provided for you to type in information based on your individual needs.

Trust and fiduciary services and other banking products are provided by Bank of America, N.A., Member FDIC, and a wholly owned subsidiary of Bank of America Corporation ("BofA Corp.").

Investment products:

<b>Are Not FDIC Insured</b>	<b>Are Not Bank Guaranteed</b>	<b>May Lose Value</b>
-----------------------------	--------------------------------	-----------------------

# Getting started

---

## Digital security questions

Do you have a default method of assigning usernames and passwords? If so, what is the method?

Often when retrieving usernames and passwords for online accounts, you are asked to answer secret questions answered at account opening. What are your answers to commonly asked secret questions?

Question	Answer
What is your mother's maiden name?	
What is your mother's middle name?	
What is your father's middle name?	
What high school did you attend?	
What was your high school's mascot?	
What elementary school did you attend?	
In what city were you born?	
What was your first pet's name?	
What was the street name of your first home?	
What is your maternal grandfather's name?	
What was your first vehicle?	

# Banking, investments and insurance information

---

## Banking

What online bank accounts do you have?

Type	Bank	Website	Username	Password	PIN
<i>Example: Online savings account</i>	<i>ABC Bank</i>	<i>abcbank.com</i>	<i>JoeDoe</i>	<i>JDmd619!</i>	<i>8866</i>

## Personal investments

What personal investment accounts do you have?

Type	Firm	Website	Username	Password
<i>Example: Brokerage account</i>	<i>Bank of America Private Bank</i>	<i>bofa.com</i>	<i>JoeDoe</i>	<i>JDmd619!</i>

## Retirement investments

What retirement investments do you have?

Type	Firm	Website	Username	Password
<i>Example: 401(k)</i>	<i>Bank of America Private Bank</i>	<i>bofa.com</i>	<i>JoeDoe</i>	<i>JDmd619!</i>

## Insurance

What types of insurance do you have?

Type	Institution	Website	Username	Password
<i>Example: Life insurance</i>	<i>123life</i>	<i>123life.com</i>	<i>JoeDoe</i>	<i>JDmd619!</i>

# Electronic devices and storage

---

## Computers

What computers do you have?

Device	Description	Username	Password
<i>Example: Laptop</i>	<i>Joe Doe's laptop</i>	<i>JoeDoe</i>	<i>JDmd619!</i>

## Phones

What phones do you have?

Device	Description	Username	Password	PIN
<i>Example: Cell phone (personal)</i>	<i>Joe Doe's cell</i>	<i>JoeDoe</i>	<i>JDmd619!</i>	<i>1234</i>

## Other electronic devices

What other devices do you have?

Device	Description	Username	Password	PIN
<i>Example: iPad</i>	<i>Joe Doe's iPad</i>	<i>JoeDoe</i>	<i>JDmd619!</i>	<i>1234</i>

## Online storage

Where do you store your information online?

Type	Website	Username	Password
<i>Example: Dropbox</i>	<i>dropbox.com</i>	<i>JoeDoe</i>	<i>JDmd619!</i>

## Media backups and storage

Do you store information on physical devices?

Item	Description	Location
<i>Example: External Hard Drives</i>	<i>Mary Doe's hard drive</i>	<i>Mary's home office</i>

# Social and on-demand digital media

---

## Social media accounts

What social media do you use?

Type	Website	Username	Password
<i>Example: LinkedIn</i>	<i>linkedin.com</i>	<i>JoeDoe</i>	<i>JDmd619!</i>

## Digital media accounts

What digital media do you use?

Type	Website	Username	Password
<i>Example: Netflix</i>	<i>netflix.com</i>	<i>JoeDoe</i>	<i>JDmd619!</i>

# Other

---

## Loyalty programs

What loyalty programs do you have?

Type	Company	Website	Username	Password
<i>Example: Airline frequent flyer miles</i>	<i>Delta</i>	<i>delta.com</i>	<i>JoeDoe</i>	<i>JDmd619!</i>

## Online shopping and auction accounts

Do you have online shopping or auction accounts?

Type	Website	Username	Password
<i>Example: Amazon</i>	<i>amazon.com</i>	<i>JoeDoe</i>	<i>JDmd619!</i>



## Personal financial software

Do you use financial software to track your personal financial information?

Type	Website	Username	Password
<i>Example: Quicken</i>	<i>quicken.com</i>	<i>JoeDoe</i>	<i>JDmd619!</i>

## Miscellaneous

What other online accounts would you like to record?

Type	Description	Website	Username	Password