BANK OF AMERICA

Digital inventory worksheet

Explore the full range of topics in our Financial Empowerment Program:

Financial basics

Life events

Protecting myself

Trusts and estates

Business

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Location of physical files and media backup

Personal records

Item	Location	Maintain/Purge*

Financial records (hard copies)

Item	Location	Maintain/Purge

Physical media backups

Item	Location	Maintain/Purge

Notes

*If you should become incapacitated, it is important not only to notify your agent about your digital assets, but also to let him/her know whether he/she needs to keep them or dispose of (purge) them.

Digital security questions

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

Answers to secret questions often used when retrieving usernames and passwords

Notes

Personal financial software and banking

Personal financial software

Software name	Website	Username	Password	Maintain/Purge

Banking

Bank	Website	Username	Password	Phone number	Contact person	Maintain/Purge

Notes

Personal and retirement investments

Personal investments

Manager/Account	Website	Username	Password	Phone number	Contact person	Maintain/Purge

Retirement investments

Manager/Account	Website	Username	Password	Phone number	Contact person	Maintain/Purge

Notes

Credit cards and debt

Credit cards

Institution	Website	Username	Password	Phone number	Contact person	Maintain/Purge

Debt

Institution	Website	Username	Password	Phone number	Contact person	Maintain/Purge

Notes

Insurance

Insurance

Policy	Website	Username	Password	Phone number	Contact person	Maintain/Purge

Notes

Computers and phones

Computers

Device	Description	Username	Password	Maintain/Purge

Phones

Device	Description	Username	Password	Maintain/Purge

Notes

Other electronic devices and email and messaging accounts

Other electronic devices

Device	Description	Username	Password	Maintain/Purge

Email and messaging accounts

Service provider	Email address	Username	Password	Maintain/Purge

Notes

Utilities and loyalty programs accounts

Utilities

Service	Website	Username	Password	Maintain/Purge

Loyalty programs

Company	Website	Username	Password	Maintain/Purge

Notes

Online storage and online shopping and auction accounts

Online storage

Storage service	Website	Username	Password	Maintain/Purge

Online shopping and auction accounts

Company	Website	Username	Password	Maintain/Purge

Notes

Social networks and digital media accounts

Social networks

Company	Website	Username	Password	Maintain/Purge

Digital media accounts

Company	Website	Username	Password	Maintain/Purge

Notes

Domain names and other accounts/items

Domain names

Domain name	Web host	Username	Password	Maintain/Purge

Other accounts/items

Items	Website	Username	Password	Maintain/Purge

Notes

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