

# DIGITAL ESTATE INFORMATION

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## I. LOCATIONS OF HARD COPY FILES AND MEDIA BACKUP

Personal records =

Financial =

Home/apartment records =

Media backups =

The location of traditional paper records as well as where back ups of digital information are stored is very helpful.

## II. DEFAULT INFORMATION

User names =

Passwords =

Secret questions:

Mother's maiden name =

Grade school =

Street where grew up =

Many clients have default information which they use for many accounts. If no specific access information is provided, this at least provides a starting point.

Some clients may also have a method of assigning passwords. If so, the client should provide this information.

**III. ELECTRONIC DEVICE ACCESS**

<u>Device</u>	<u>Website</u>	<u>Username</u>	<u>PIN</u>	<u>Password</u>
Computer – home				
Computer – office				
Operating System				
Voice mail – home				
Voice mail – work				
Voice mail – cell phone				
Security system				
Tablet				
e-Reader				
GPS				
Router				
DVR/TiVo				
Television				

**IV. E-MAIL ACCOUNTS**

<u>Description</u>	<u>E-mail address</u>	<u>Username</u>	<u>PIN</u>	<u>Password</u>	<u>Disposition Desires</u>
Work					
Home					
School					

**V. DOMAIN NAMES**

<u>Website/Domain Name</u>	<u>Webhost</u>	<u>Username</u>	<u>PIN</u>	<u>Password</u>
Personal				
Business				

**VI. ON-LINE STORAGE**

<u>Name</u>	<u>Website</u>	<u>Username</u>	<u>PIN</u>	<u>Password</u>
Dropbox				
Google Drive				

**VII. FINANCIAL SOFTWARE**

<u>Item</u>	<u>Website</u>	<u>User Name</u>	<u>PIN</u>	<u>Password</u>
Quicken				
TurboTax				

**VIII. BANKING**

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>ATM PIN</u>	<u>Security Image</u>
Checking					
Savings					
PayPal					

**IX. STOCKS, BONDS, SECURITIES**

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>

**X. INCOME TAXES**

<u>Item</u>	<u>Website</u>	<u>User Name</u>	<u>PIN</u>	<u>Password</u>
Federal Income tax payment	<a href="https://www.eftps.com/eftps/">https://www.eftps.com/eftps/</a>			
State Income tax payment				
Prior computerized tax returns				

**XI. RETIREMENT**

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>

**XII. INSURANCE**

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>
Health				
Life				
Property				

**XIII. CREDIT CARDS**

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>PIN</u>
American Express				
Visa				

**XIV. DEBTS**

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>
Mortgage				
Cars				
Student Loan				

**XV. UTILITIES**

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>
Electric				
Gas				
Internet				
Phone(landline)				
Phone (cell)				
TV				
Trash				
Water				

**XVI. BUSINESSES**

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>
Amazon.com				
e-Bay.com				

**XVII. SOCIAL NETWORKS**

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Disposition Desires</u>
Facebook				
LinkedIn				
Twitter				
MySpace				

**XVIII. DIGITAL MEDIA ACCOUNTS**

<u>Institution</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>	<u>Other Information</u>
Netflix				
iTunes				
YouTube				
Hulu				
Nook				
Kindle				



**XIX. LOYALTY PROGRAMS**

<u>Name</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>
Delta			
Southwest Airlines			
Best Buy			
Office Depot			

**XX. OTHER ACCOUNTS**

<u>Name</u>	<u>Website</u>	<u>User Name</u>	<u>Password</u>
Skype			
LoJack			
WoW			
HalfLife			
Flickr			
Medical records			