

DIGITAL ASSET QUESTIONNAIRE

INSTRUCTIONS: ON A SEPARATE DOCUMENT OR SHEET OF PAPER, REVIEW EACH OF THESE QUESTIONS AND THEN LIST THE WEB ADDRESS OR NAME OF SITE, YOUR USERNAME, WHAT YOU WANT DONE WITH THE ACCOUNT IN THE EVENT OF DEATH.

SAMPLE

WEBSITE	USERNAME	NOTES ON DISTRIBUTION
Naomistal.com	Nastal	I want the content and the website to pass to the successor attorney I appoint in my Will.

- I. My personal life
 - a. Homes and real estate? Mortgage paid online? Taxes paid online? Property management paid online? Communicated online? Transfer to specific bank?
 - b. Employment- do you have work email or work login portal? Do you use slack or crew or Monday for communicating with co-workers?
 - c. Vehicles- do you pay DMV registration online?
 - d. Pets- Is your veterinarian have a portal for clients or client file online for your pet(s)?

- II. Health and Medical
 - a. Doctors- do you have online access to your health insurance?
 - b. Prescriptions – do you order your prescriptions online?
 - c. Health information- Is any of this information stored online or accesses online?

- III. Digital world
 - a. Password management system- do you currently use a password management system?
 - b. Email accounts (name all, even old ones)- list all of them, including work and accounts you don't use anymore
 - c. Devices (laptop, tablet, cell)- list all electronics, including kindles
 - d. Social media- facebook, twitter, Instagram, pinterest, linked in, etc.
 - e. Shopping/ecommerce (amazon, target)
 - f. Payment/money management (paypal, venom, mint)
 - g. Bank accounts (see “financial” below)
 - h. Crypto currency (see “financial” below)
 - i. Video streaming (Netflix, hulu)
 - j. Music (itunes, spotify, soundcloud)
 - k. Blog
 - l. Software (Quickbooks, Microsoft word)

- m. Web hosting
- n. Messages (Voip), cell phone service- Do you use an online portal for your VoIP?
- o. Travel (time shares, rewards)- Do you have online accounts?
- p. Ticketing (ticketmaster) Do you have online accounts
- q. Other sites
- r. Professional sites (avvo)
- s. domain names,
- t. t. cryptocurrency, crypto wallet

IV. Financial

- a. Financial advisors- Do you have an online forum you use to communicate with them?
- b. Financial accounts and assets- Is any of this information stored online or accessed online? Such as online brokerage accounts? Online trading accounts, online investment accounts?
- c. Life insurance- Do you pay this online?
- d. Benefits and pensions- Do you have access to them online? Do you pay into these online? Is it direct deposit? Are your vacation time or sick time in an HR system?
- e. Disability insurance- Do you pay this online?