



LAW OFFICES OF NAOMI T. STAL ESTATE PLANNING

DIGITAL QUESTIONNAIRE

I. PASSWORD MANAGEMENT

1. Do you use password management software? (circle) YES NO
a. If yes, what software do you use? _____
b. Do you like it? (circle) YES NO
2. Do you store your passwords in a document? (circle) YES NO
a. If yes, is that document:
 - i. a Microsoft word document? (circle) YES NO
 - ii. A PDF? (circle) YES NO
 - iii. An excel spreadsheet? (circle) YES NO
 - iv. Online cloud like google drive? (circle) YES NO
 - v. Online word like google docs? (circle) YES NO
3. Do you write your passwords down in a hand written document or a note pad? (circle) YES NO

II. YOUR PERSONAL DIGITAL LIFE

1. Do you pay bills online? What is your estimate of number of bills that you pay online every month?
None of my bills 1-5 5-10 10-20 All my bills
2. Does your job pay you with direct deposit? What is your estimate of how many different sources of money or income get paid to you by direct deposit, cash apps on your phone, electronic transfers, money management, or crypto currency?
None of my income or profit 1-5 5-10 10-20 All my income or profit
3. Do you pay your car registration or house taxes online or taxes? What is your estimate of how many local, state, or federal government documents you file online?
None Some All or Whatever I can
4. Do you manage your retirement assets online? (circle) YES NO
a. Communicate with your financial advisors online via software or via email?
(circle) YES NO

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b. Online brokerage accounts? Online trading accounts, online investment accounts?
Life insurance payment or account? Disability insurance?

(circle) ALL SOME NONE

5. If you take medicine, make doctor’s appointments, or fill prescriptions, do you do any of this online, ordering, delivery, scheduling?

None Some Always or Whatever I can do online, I will

6. How many active electronic devices do you actively use (device is a cell phone, a tablet, a laptop, a kindle, Alexa, Ipad, etc.)?

None 1 2 3 4 5 More than 5

7. How many non-active devices do you have in your house or garage?

None 1 2 3 4 5 More than 5

8. Do you communicate with family and friends online? (circle) YES NO

a. Email accounts and text accounts:

None 1 2 3 4 5 More than 5

b. Social Media accounts:

None 1 2 3 4 5 More than 5

c. Picture storage or picture sharing:

None 1 2 3 4 5 More than 5

d. Video storage or video sharing:

None 1 2 3 4 5 More than 5

e. Document storage or document sharing:

None 1 2 3 4 5 More than 5

9. Do you have online hobbies or engage in recreational activities?

a. Google, YouTube or internet searches? (circle) YES NO

b. Watch TV or movies? (circle) YES NO

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- c. Shop for food, clothes, household items, etc.? (circle) YES NO
- d. Listen to music, share music, podcasts, and Audio books? (circle) YES NO
- e. Play video games, gamble, either online or on your own? (circle) YES NO
- f. Belong to communities in chat rooms or other? (circle) YES NO
- g. Socialize or chat online with groups (circle) YES NO
- h. Travel? Time share? Purchase tickets? Season passes? (circle) YES NO

10. If something happened to you, would you be embarrassed, uncomfortable, or upset if family members and/or friends saw some of the things you did online or were able to see your online history?
(circle) YES NO

III. YOUR PROFESSIONAL DIGITAL LIFE

1. Do you own your own your own company, or part of a business? (circle) YES NO

2. What type of business entity?

(circle) LLC CORP LLP Sole Proprietor Other/I don't know

3. How many partners/shareholders/members?

(circle) Just me me+1 me + more than 1

4. Have you created processes, formulas, trademarks, patents, copy written material, recipes, or any other proprietary or confidential information you would want to protect, share with specific people under specific conditions, or control access to?

(circle) YES NO

5. What parts of the business are you responsible for? (circle every one that applies to you)

Account Payable	Marketing	Customer service	Receptionist	Administration
Accounts Receivable	Collections	Management	Bookkeeping	Payroll & taxes
Human Resources	Hiring & Firing	Legal & Contract	Operations	ALL OF IT

6. For each position you are responsible for, do you have a list of accounts, usernames, etc.?

(circle) YES NO

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7. Do you have:

a. Work email?

None 1 2 3 4 5 More than 5

b. Social media?

None 1 2 3 4 5 More than 5

c. Backend online marketing accounts or applications?

None 1 2 3 4 5 More than 5

d. Automated systems using software or project management CRM, or communications management?

None 1 2 3 4 5 More than 5

e. Software subscriptions, annual or monthly (Microsoft, bookkeeping, A/R, A/P,)?

1-5 5-10 10-15 15-25 more than 25

f. Domains owned by you, your partner, or company? URL's? Websites? Blogs?

(circle) YES NO

8. Are you responsible for paying the premiums for all types of business related insurance?

(circle) YES NO

9. If something happened to you and you couldn't work, does someone know how to get online access to *everything* you are responsible for?

(circle) YES NO

SUMMARY

Many people don't give technology, internet, and online activity much thought because it's so drastically different than traditional assets like a house or bank account. However, even if the assets don't have their own inherit value (i.e. you can't sell them), they are gatekeepers to many aspects of our lives. After completing this questionnaire, perhaps it's time to take some steps to secure your digital future?

We have blog posts and information that can help get you started in the proper direction. You can also call our office to schedule a consultation.

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