



DIGITAL ASSET INVENTORY & LEGACY PLANNING WORKSHEET

Organize Your Online Life for Those You Leave Behind



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MEMORIAL MERITS
MemorialMerits.com

DIGITAL ASSET INVENTORY & LEGACY PLANNING WORKSHEET *Organize Your Online Life for Those You Leave Behind*

IMPORTANT SECURITY NOTICE:

This document contains sensitive access information. Store it securely using one of these methods:

- Encrypted digital file (store encryption password separately with estate documents)
- Password manager with emergency access feature
- Locked safe or secure location (inform executor/agent of location)
- With your attorney in sealed envelope

DO NOT store this document in plain text on your computer or email it to yourself.

PERSONAL INFORMATION

Your Name: _____

Date Created: _____

Last Updated: _____

Digital Executor/Contact: _____

Their Phone: _____

Their Email: _____

HOW TO USE THIS INVENTORY

For each account, record:

- Account name and website
- Username/email used for login
- Password (or note "See password manager")
- Two-factor authentication method

[Memorial Merits | Honoring Life & Legacy](https://memorialmerits.com/digital-legacy-planning-protecting-your-online-life-after-death/)

Read the full guide: <https://memorialmerits.com/digital-legacy-planning-protecting-your-online-life-after-death/>

- Security questions/answers if applicable
- Instructions for what to do with account after death

Update this inventory:

- When you open new accounts
- When you change passwords
- At least twice per year
- After any major life changes

SECTION 1: EMAIL ACCOUNTS

EMAIL ACCOUNT 1

Service: (Gmail, Outlook, Yahoo, etc.) _____

Email Address: _____

Password: _____ OR ☐ Stored
in password manager: _____

Two-Factor Authentication: ☐ Yes ☐ No

- Method: ☐ Text ☐ App ☐ Email ☐ Hardware key
- Backup codes location: _____

Recovery Email: _____

Recovery Phone: _____

Connected Accounts: (List other accounts using this email for login)

After Death Instructions: ☐ Provide access to executor/family ☐ Download archive of emails and attachments ☐ Close account after _____ days/months ☐ Other:

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Important Information: (Filters, folders to check, pending matters)

EMAIL ACCOUNT 2

Service: _____

Email Address: _____

Password: _____

Two-Factor Authentication: ☐ Yes ☐ No

- Method: _____
- Backup codes: _____

After Death Instructions: ☐ Provide access ☐ Archive ☐ Close ☐ Other:

EMAIL ACCOUNT 3

Service: _____

Email Address: _____

Password: _____

After Death Instructions: ☐ Provide access ☐ Archive ☐ Close ☐ Other:

SECTION 2: FINANCIAL ACCOUNTS

ONLINE BANKING

Bank 1:

- Bank Name: _____

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- Account Type: ☐ Checking ☐ Savings ☐ Both
- Website: _____
- Username: _____
- Password: _____
- Two-Factor Authentication: ☐ Yes ☐ No
 - Method: _____
- Approximate Balance: \$ _____
- Account Number(s): _____

Bank 2:

- Bank Name: _____
- Website: _____
- Username: _____
- Password: _____
- Account Number(s): _____

INVESTMENT & BROKERAGE ACCOUNTS

Account 1:

- Company: _____
- Website: _____
- Username: _____
- Password: _____
- Account Number: _____
- Approximate Value: \$ _____
- Financial Advisor Contact: _____

Account 2:

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- Company: _____
 - Account Number: _____
 - Approximate Value: \$ _____
-

RETIREMENT ACCOUNTS

401(k) / IRA / Other:

- Company: _____
 - Website: _____
 - Username: _____
 - Password: _____
 - Account Number: _____
 - Approximate Value: \$ _____
 - Beneficiary Designated: ☐ Yes ☐ No
 - Primary: _____
 - Contingent: _____
-

CREDIT CARDS

Card 1:

- Card Issuer: _____
- Last 4 Digits: _____
- Online Account Username: _____
- Password: _____
- Auto-Payments Set Up: ☐ Yes ☐ No
 - For: _____

Card 2:

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- Card Issuer: _____
 - Last 4 Digits: _____
 - Username: _____
 - Auto-Payments: _____
-

PAYMENT SERVICES

PayPal:

- Email/Username: _____
- Password: _____
- Linked Bank/Card: _____
- Approximate Balance: \$ _____

Venmo:

- Username: _____
- Password: _____
- Linked Account: _____

Apple Pay / Google Pay / Other:

- Service: _____
 - Access Info: _____
-

CRYPTOCURRENCY

Exchange/Wallet 1:

- Platform: _____
- Username/Email: _____
- Password: _____
- Two-Factor: _____

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- Approximate Holdings: \$ _____

Hardware Wallet:

- Type/Brand: _____
- Location: _____
- PIN/Password: _____
- Recovery Seed Phrase Location: _____

CRITICAL: Store recovery phrase separately and securely

Important Notes About Crypto:

SECTION 3: SOCIAL MEDIA ACCOUNTS**FACEBOOK**

Profile URL: _____

Email/Username: _____

Password: _____

Two-Factor Authentication: ☐ Yes ☐ No

Legacy Contact Designated: ☐ Yes ☐ No

- Legacy Contact Name: _____

After Death Preference: ☐ Memorialize account (Legacy contact manages) ☐ Delete account permanently ☐ Other: _____

INSTAGRAM

Username: _____

Password: _____

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Connected to Facebook? ☐ Yes ☐ No

After Death Preference: ☐ Memorialize ☐ Delete ☐ Other:

TWITTER / X

Handle: _____

Email Used: _____

Password: _____

After Death Preference: ☐ Keep active temporarily ☐ Delete ☐ Other:

LINKEDIN

Profile URL: _____

Email: _____

Password: _____

After Death Preference: ☐ Memorialize (maintain professional legacy) ☐ Delete

OTHER SOCIAL MEDIA

TikTok / Snapchat / Pinterest / YouTube / Other:

Platform: _____

- Username: _____
- Password: _____
- Instructions: _____

Platform: _____

- Username: _____

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- Password: _____
-

SECTION 4: CLOUD STORAGE & PHOTOS

GOOGLE DRIVE / GOOGLE PHOTOS

Email: _____

Password: _____

Storage Used: _____ GB

Inactive Account Manager Set Up: ☐ Yes ☐ No

- Timeout Period: _____
- Trusted Contacts: _____

Important Files/Folders:

After Death Instructions: ☐ Provide access to designated person ☐ Download all files/photos
☐ Delete after archiving ☐ Other:

ICLOUD

Apple ID: _____

Password: _____

Storage Used: _____ GB

Legacy Contact Designated: ☐ Yes ☐ No

- Legacy Contact: _____
- Access Key Provided: ☐ Yes ☐ No

Important Content:

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DROPBOX / ONEDRIVE / OTHER CLOUD STORAGE

Service: _____

Email/Username: _____

Password: _____

Storage Used: _____ GB

Shared Folders/Collaborators:

Important Files:

After Death Instructions:

SECTION 5: WEBSITES & BLOGS

PERSONAL WEBSITE / BLOG

Website URL: _____

Purpose: ☐ Personal blog ☐ Professional ☐ Business ☐ Other

Domain Registrar:

- Company: _____
- Username: _____
- Password: _____
- Renewal Date: _____
- Auto-Renewal: ☐ Yes ☐ No

Web Hosting:

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- Company: _____
- Username: _____
- Password: _____
- Plan/Cost: _____

Content Management:

- Platform: (WordPress, Wix, Squarespace, etc.) _____
- Admin Username: _____
- Admin Password: _____

After Death Instructions: ☐ Keep site running for _____ months/years ☐ Update with memorial notice ☐ Archive and then close ☐ Transfer to: _____ ☐ Delete immediately

Revenue/Monetization: (if applicable)

- Ad networks: _____
- Affiliate programs: _____
- Estimated monthly income: \$ _____

SECTION 6: ONLINE BUSINESSES

E-COMMERCE / ONLINE BUSINESS

Business Name: _____

Platform: (Amazon, Etsy, eBay, Shopify, etc.) _____

Website: _____

Seller Account Username: _____

Password: _____

Payment Account: (Where money deposits) _____

Inventory Location: _____

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Suppliers: _____

Estimated Monthly Revenue: \$ _____

Business Value: \$ _____

After Death Instructions: ☐ Attempt to sell business (contact: _____) ☐ Close business and liquidate inventory ☐ Transfer to: _____ ☐ Keep running temporarily while estate settles

Important Contacts:

- Supplier 1: _____
 - Supplier 2: _____
 - Fulfillment: _____
-

SECTION 7: SUBSCRIPTIONS & MEMBERSHIPS

List all recurring subscriptions to be canceled after death:

STREAMING SERVICES

Netflix:

- Email: _____ Password: _____
- Cost: \$ _____/month

Spotify / Apple Music / Other:

- Service: _____ Email: _____
- Cost: \$ _____/month

Other Streaming:

- Service: _____ Cost: _____
-

SOFTWARE & CLOUD SERVICES

Microsoft 365 / Google Workspace / Adobe:

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- Service: _____ Email: _____
- Cost: \$ _____/month

Cloud Storage:

- Service: _____ Cost: _____

Other Software:

- Service: _____ Cost: _____

NEWS & MAGAZINES

Service: _____ Cost: \$ _____

Service: _____ Cost: \$ _____

FITNESS & WELLNESS

Gym Membership:

- Location: _____ Cost: \$ _____

Apps/Online Programs:

- Service: _____ Cost: _____

OTHER SUBSCRIPTIONS

Service: _____ Cost: \$ _____

Service: _____ Cost: \$ _____

Service: _____ Cost: \$ _____

TOTAL ESTIMATED MONTHLY SUBSCRIPTIONS: \$ _____

SECTION 8: GAMING & ENTERTAINMENT

GAMING ACCOUNTS

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Steam / PlayStation / Xbox / Nintendo:

Platform: _____

- Username: _____
- Password: _____
- Email: _____
- Approximate Value: (games, currency, items) \$ _____

Platform: _____

- Username: _____
 - Value: \$ _____
-

SECTION 9: PROFESSIONAL ACCOUNTS

LinkedIn: (Already covered in Social Media? ☐ Yes)

Professional Organizations:

- Organization: _____ Website: _____
- Username: _____ Password: _____

Industry Platforms:

- Platform: _____ Username: _____
 - Password: _____
-

SECTION 10: SMART HOME & IOT DEVICES

Smart Home Hub:

- System: (Alexa, Google Home, Apple HomeKit) _____
- Email: _____ Password: _____

Connected Devices:

- Thermostat: _____ Account: _____

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- Security System: _____ Account: _____
 - Smart Locks: _____ Account: _____
 - Other: _____ Account: _____
-

SECTION 11: REWARD PROGRAMS

Airlines:

- Airline: _____ Account #: _____
- Approx. Miles: _____ Transferable? ☐ Yes ☐ No

Hotels:

- Chain: _____ Account #: _____
- Approx. Points: _____ Transferable? ☐ Yes ☐ No

Credit Card Rewards:

- Card: _____ Points: _____
- Transferable? ☐ Yes ☐ No

Retail Rewards:

- Store: _____ Account: _____
-

SECTION 12: HEALTH & MEDICAL

Patient Portals:

- Provider: _____ Website: _____
- Username: _____ Password: _____

Pharmacy:

- Pharmacy: _____ Account: _____

Health Apps:

- App: _____ Account: _____

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Fitness Trackers:

- Device: _____ Account: _____
-

SECTION 13: DEVICES & LOCAL STORAGE**Computers:**

- Device: _____ Login Password: _____
- Location: _____ Encryption: ☐ Yes ☐ No

Tablets/iPads:

- Device: _____ Passcode: _____

Smartphones:

- Device: _____ Passcode: _____
- SIM PIN: _____

External Hard Drives:

- Location: _____ Password/Encryption: _____
- Contents: _____

USB Drives:

- Location: _____ Contents: _____
-

PASSWORD MANAGER INFORMATION

If you use a password manager, this is the MOST IMPORTANT SECTION

Password Manager: (LastPass, 1Password, Dashlane, Bitwarden, etc.)

Master Password: _____ **Store this**
information with your attorney or in your safe

Emergency Access Set Up: ☐ Yes ☐ No

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Emergency Contacts:

- Contact 1: _____ Waiting Period: _____ hours
- Contact 2: _____ Waiting Period: _____ hours

Recovery Key Location: (if applicable)

Two-Factor Authentication for Password Manager:

- Method: _____
 - Backup Codes Location: _____
-

MASTER ACCESS INFORMATION**Most Important Accounts to Access First:**

1. _____
2. _____
3. _____

Where This Document is Stored:

People Who Know About This Document:

- Name: _____ Relationship: _____
- Name: _____ Relationship: _____

Encryption Method (if applicable):

- Software used: _____
 - Encryption password stored: _____
-

PLATFORM LEGACY FEATURES CHECKLIST

Verify you've set up these built-in legacy features:

☐ Google Inactive Account Manager

- Timeout period: _____ months
- Trusted contacts designated: ☐ Yes ☐ No

☐ Facebook Legacy Contact

- Contact designated: ☐ Yes ☐ No
- Name: _____

☐ Instagram Memorialization Settings

- Preference set: ☐ Yes ☐ No

☐ Apple Legacy Contact

- Contact designated: ☐ Yes ☐ No
- Access key provided: ☐ Yes ☐ No

☐ Microsoft Account Settings

- Legacy settings configured: ☐ Yes ☐ No

INSTRUCTIONS FOR MY DIGITAL EXECUTOR

Dear _____,

Thank you for serving as my digital executor. Here's what I want you to do:

Immediate Actions (First 30 Days): ☐ Access this inventory (location: _____) ☐ Gain access to password manager using emergency

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access ☐ Cancel subscriptions (see Section 7) ☐ Secure financial accounts (Section 2) ☐
Backup all photos and important files (Sections 4)

Social Media (Within 60 Days): ☐ Follow my instructions for each platform (Section 3) ☐ Post memorial notice if I've requested ☐ Download archives before closing accounts

Websites & Businesses (Within 90 Days): ☐ Follow instructions in Sections 5-6 ☐ Consult with executor about business value ☐ Transfer or close as instructed

Final Steps: ☐ Delete accounts as instructed ☐ Secure cryptocurrency and ensure transfer to beneficiaries ☐ Archive important communications and files ☐ Close email accounts last (needed for other account access)

Special Instructions:

NOTES & UPDATES LOG

Use this space to record updates:

Date: _____ **Changes made:**

Date: _____ **Changes made:**

Date: _____ **Changes made:**

FINAL REMINDERS

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✓ Update this inventory at least twice per year ✓ Review after any major life changes ✓ Ensure digital executor knows how to access this document ✓ Store securely - this contains sensitive information ✓ Set up platform legacy features where available ✓ Communicate your wishes to family members ✓ Include digital asset provisions in legal estate documents

Download more free legacy planning resources at MemorialMerits.com

Read the complete article: Digital Legacy Planning: Protecting Your Online Life After Death

Need support? Talk to Solace 24/7 at MemorialMerits.com/solace

Memorial Merits | Clear Guidance Through Impossible Times

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