Digital Asset Inventory

spend time
FINANCIAL PLANNING

Digital Assets Inventory

Please Note:

1. The focus of this inventory is intended for personal computing (personal and home use) and not business, organisational or commercial computing. You can print it off and complete the inventory manually, or you can fill it out online using Adobe's free tool here.
2. Securely store account access instructions (including passwords and PINs) separate from this inventory. Individuals should discuss with their advisors how and when to provide fiduciaries with the necessary estate information for them to complete their duties.
3. **Password sharing** is prohibited for most online accounts. Refer to specific provider terms of service for details. Follow technology advice and service provider guidance on keeping passwords and accounts secure. Review security and privacy settings regularly for privacy and confidentiality. Review or request pre-planning functions from service providers you use.
4. When completing any estate plan seek appropriate legal, tax, technical, philanthropic, charitable, insurance, family office and other appropriate specialised advice in your jurisdiction.
5. Keep inventories current as life circumstances change and/or technology evolves.
6. As this is merely an inventory, additional supporting technical, legal, tax and other documents will be required to support the portfolio of digital assets, in addition to specialised planning documents, processes, transactions and test plans that will be required for significant digital assets (e.g., having financial or sentimental value, or required by regulatory rules or jurisdictional specific laws).
7. The examples provided are not an endorsement of a specific provider, product, software, or service and are merely used to illustrate a particular type of digital asset in an associated section.
8. Although inventories for the purposes of estate planning, incapacity planning and estate administration are recommended, you will want to understand the implications, assess the risks, understand your risk tolerance, plan for and mitigate the risks of creating and maintaining such a consolidated list of your estate digital assets.
9. This inventory is provided for information purposes only, to encourage and raise the awareness of the importance of digital assets in one's individual estate. Individuals, practitioners and their associated organisations are encouraged to seek appropriate professional advice in their jurisdiction to address digital assets in their estates, their portfolios and/or businesses.

SECTION 1: Email Providers

Email Tip – **Password sharing** is prohibited for most if not all online accounts. Refer to the terms of service of a specific account and/or jurisdictional specific laws. Look for and/or ask for provider pre-planning options. For example, Google's Inactive Account Manager (search in settings or help). If you select a person other than your fiduciary as your Inactive Account Manager, let the fiduciary know.

Digital Asset	Username (Indicate N/A if you don't use a specific type of account)	Additional Details
e.g GMail, Yahoo		

SECTION 1.2: Social Media Platforms

Digital Asset	Username (Indicate N/A if you don't use a specific type of account)	Additional Details
e.g Instagram Facebook		

Do not include passwords, security question answers or PINs on the Inventory

SECTION 1.3: Communication and Collaboration Platforms

Digital Asset	Username (Indicate N/A if you don't use a specific type of account)	Additional Details
e.g Microsoft Teams, Skype, Zoom, Whatsapp		

SECTION 1.4: Digital Photos, Video Providers and Storage

Digital Asset	Username (Indicate N/A if you don't use a specific type of account)	Additional Details
e.g Dropbox, Google Photos		

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SECTION 1.5: Cloud-based Applications

Digital Asset	Username (Indicate N/A if you don't use a specific type of account)	Additional Details
e.g. Apple iCloud, Google Drive		

SECTION 1.6: Household IT and Communication Management

Digital Asset	Username (Indicate N/A if you don't use a specific type of account)	Additional Details
e.g. Internet Provider, Mobile Phone Provider		

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SECTION 1.7: Password Managers

Password Manager Tip – Consider keeping separate password managers and/or vaults for business versus home/personal use.

Digital Asset	Username (Indicate N/A if you don't use a specific type of account)	Additional Details
e.g. 1Password, Keeper		

SECTION 1.8: Funeral, Legacy Pre-Planning Accounts, Heritage Accounts and Services

Pre-Planning Tip – Arranging a funeral is the first thought after death for your family and the fiduciary. If they are unaware of your wishes and pre-planning, they may be lost; effort and cost may be duplicated.

Digital Asset	Username (Indicate N/A if you don't use a specific type of account)	Additional Details
e.g. Funeral pre-planning account, Genealogy account		

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SECTION 1.9: Virtual Assets (e.g websites and domains)

Virtual Asset Tip – Of the many considerations in preparing these type of accounts for incapacity planning, succession, and estate administration, it is important that the ownership information within the account profile is accurate and up to date.

Digital Asset	Username (Indicate N/A if you don't use a specific type of account)	Additional Details
e.g. Web Domain Account, Web Hosting Account		

SECTION 1.10: Virtual Assets associated with a hobby, entertainment, education or small home-based business

Online Account Tip – If your home-based activities, including hobbies, have expanded into acquiring, trading, building or holding digital assets or online assets, seek technical, legal, tax and specialised advice that is appropriate to your situation.

Digital Asset	Username (Indicate N/A if you don't use a specific type of account)	Additional Details
e.g. Gaming Accounts, Buying, Selling or Trading Accounts		

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SECTION 1.11: Blockchain Assets, Crypto-Assets

Digital Asset Tip – Blockchain assets, crypto-assets and other virtual-only digital assets of value are an emerging field. Identifying and securing these assets is complex to meet the evolving innovation in this space as well as the cyber security environments and threats.

Digital Asset	Username (Indicate N/A if you don't use a specific type of account)	Additional Details
e.g. Cryptocurrency, Cryptoassets		

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SECTION 1.12: Our top-three most important digital assets of value

Tip – Although it is recommended to keep your digital asset inventory current, this can be a daunting task. At a minimum, identify the top-three digital assets that you feel would be the biggest loss if your wishes or preferences for them were not realised by your fiduciary. These may have financial and/or sentimental value such as your digital photos, cryptocurrencies, web domain, hobby accounts, blogs or loyalty points. This information can help ensure your fiduciary safeguards your most valued digital assets. You may have more than three, in which case utilise the additional boxes below.

Digital Asset	Username (Indicate N/A if you don't use a specific type of account)	Additional Details

Do not include passwords, security question answers or PINs on the Inventory

SECTION 1.13: Blank worksheet for other digital assets

Digital Asset	Username (Indicate N/A if you don't use a specific type of account)	Additional Details

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SECTION 2: Digital Devices Inventory

Hardware Tip – Details include: make, model, serial number, locations, locators for the device, applications on device, cloud back-ups and contracts/leases to support ownership.

Digital Device	Username	Location of Access Instructions	Additional Details
Computer			
Laptop			
Tablet/iPad			
Smartphone/iPhone/ Mobile			
Storage Devices			
Virtual/Augmented Reality Devices			
Other Devices			
Other Devices			

Do not include passwords, security question answers or PINs on the Inventory

SECTION 2.2: Software Installed on Hardware

Software Tip – Details include: location of licence details, devices installed on, verification information and purchase agreements to support ownership.

Digital Device	Username	Location of Access Instructions	Additional Details
e.g., Apple IOS, Windows, Linux, Chrome			

SECTION 2.3: File Storage Devices Including Backup Devices

File Storage Tip – Details include: make, model and capacity of storage device and contracts/purchase agreements to support ownership.

Digital Device	Username	Location of Access Instructions	Additional Details
e.g. External Hard Drive, USB Drive			

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SECTION 3: Estate Planning, Incapacity Planning and Estate Administration Platforms (including emerging estate tech solutions, estate digital assets vaults, property rights and interests inventories, software, platforms and offerings)

Estate Platforms Tip – Integrated 'estate ecosystem' platforms, cloud and data storage providers are often set up as subscription services with automatic payments. A fiduciary will need to be aware of these accounts to make other payment arrangements if the data is to be retained or transferred and may need to provide documentation supporting their role for access.

Digital Account	Username	Additional Details

Do not include passwords, security question answers or PINs on the Inventory

SECTION 3.2: Online Accounts Providing Access to Underlying Financial Assets or Insurance

Online Account Tip – Password sharing is prohibited for most if not all online accounts. Refer to the terms of service and/or jurisdictional specific laws. Contact each institution to determine if any advance planning or registration is available, such as registering the fiduciary or providing separate secure and compliant access. Ask what information can be shared in advance with the fiduciary.

Digital Account	Username	Additional Details
Bank		
Bank		
Financial Institution		
Financial Institution		
Life Insurance Policy		
Health Insurance Policy		
Home Insurance Policy		
Employee or Private Pension		
Government Pension		
Investment Account		
Securities Trading Account		
Financial Planning or Wealth Management Account		

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SECTION 3.3: Online Accounts Providing Access to Underlying Debt and Liabilities

Online Account Tip – Keep detailed information in this inventory to a minimum to protect confidentiality and privacy of account holdings. Simply note the institution name, physical address, weblink, contact person and type of debt. Identify if your liability account or debt instrument has insurance coverage for incapacity and/or death and where to find this additional information.

Digital Account	Username	Additional Details
e.g. Visa, Mastercard		

SECTION 3.4: Online Accounts Providing Access to Underlying Government, Public or Private Services and Programmes

Online Account Tip – With little paper trail in today's home office, given online access to services and receive statements, it will be difficult for the fiduciary to know what government agencies, programmes or private services you deal with and/or are entitled to. Do you deal with multiple agencies or various levels of government for programmes and services?

Digital Account	Username	Additional Details
e.g., health services, administrative services		

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SECTION 3.5: Online Accounts Providing Access to Online or Third-Party Payment Providers and Services

Online Account Tip – Keep detailed information in this inventory to a minimum to protect confidentiality and privacy of account holdings. Simply note institution name, physical address, web link and type of payment provider. Reach out to the payment provider to determine if there are pre-planning options for legally identified individuals to access and/or what documentation the fiduciary will need to provide on incapacity and/or death.

Digital Account	Username	Additional Details
e.g. Apple Pay. Google Pay		

SECTION 3.6: Online Entertainment, Content Subscription Services and Accounts

Online Account Tip – With subscription services often set up with automatic payments, a fiduciary will need to be aware of these accounts to close them down to reduce expenses to the estate.

Digital Account	Username	Additional Details
e.g. Streaming Service. Gaming Account		

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SECTION 3.7: Online Shopping, Merchant, and Travel Accounts

Online Account Tip – Delete all online accounts you no longer use to reduce your digital and personal information footprint.

Digital Account	Username	Additional Details
e.g. Ebay, Booking.com		

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SECTION 3.8: Loyalty, Reward and Frequent Flyer Accounts

Reward Tip – If you have accumulated rewards or points, review the terms of service for expiry information as well as conditions and restrictions related to transferring to family members or others upon incapacity and/or death.

Digital Account	Username	Additional Details
e.g. British Airways, Amex		

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SECTION 3.9: Online Household or Property Management Accounts

Online Account Tip – Many of the services you procure to support your household may now be managed online. Without a paper trail, it will be difficult for your fiduciary to determine what you use. If you occupy secondary properties, you may want to complete a separate page for the additional location.

Digital Account	Username	Additional Details
Utilities		
Utilities		
Utilities		
Utilities		
Utilities		
Heat/Air Conditioning Account		
Home Support Service		
Land Maintenance		
Home Security System/Alarm Service Provider		
Postal and/or Delivery Service		

Do not include passwords, security question answers or PINs on the Inventory

Closing thoughts

We hope this has helped you feel clearer about how to prepare your digital life for when you die.

If you have any questions, let us know. We'd love to talk it through.

Disclaimer

Please note: We have ensured the accuracy of this guide at the time of publication, but it is not personalised legal advice. We are not liable for any loss resulting from its use. Nothing in this template should be taken as advice – we'd love to chat with you first.

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