

Digital Assets Inventory Worksheet

Barb O'Neill, Barbara O'Neill, Ph.D., CFP®, CRPC, AFC®, CFEd, CPFFE Distinguished Professor Emerita, Rutgers University; **Marsha A. Goetting**, Ph.D., CFP®, CFCS Professor and Extension Family Economics Specialist, Montana State University; **E. Edwin Eck**, Professor Emeritus, University of Montana Alexander Blewett III School of Law

NOTE: FOR MORE SPACE in any of the categories, PLEASE PRINT OR COMPLETE MORE THAN ONE PAGE AND ATTACH TO THE DOCUMENT.

The term “digital assets” refers to personal information that is stored electronically on either a computer or an online “cloud” server account that belongs to an individual. Anyone who uses e-mail, has a password protected cell phone, makes online purchases, or pays bills online has digital assets.

Digital assets generally require a username and/or password or PIN to access and can be difficult or impossible to retrieve if someone is incapacitated or dies. Some digital assets have a monetary value while others have sentimental value. Either way, they are often very important to the people who created them.

Use this worksheet to record your digital assets by category. Then keep it in a safe place and share it with your agent under a power of attorney, personal representative, and other trusted people who would need to have this information if you should become incapacitated or when you die.

Note that certain accounts allow you own may have a two-factor authorization. You need to have a record about which accounts those are and how to access the second factor (e.g., authentication app on phone, text or e-mailed code, security key, etc.). Other accounts may have security questions, such as “What is the name of your first pet?” or “In what city did you meet your spouse/significant other.” A note needs to be made about those questions and your answers.

Name of preparer: _____

Date of Preparation: _____

Date of Review: _____

Name of person you named as your digital assets fiduciary under the Montana **Revised Uniform Fiduciary Access to Digital Assets Act**.

Name: _____

Mailing Address: _____

City: _____ **State:** _____ **Zip Code:** _____

Phone Number: _____

Email Address: _____

Electronic Devices (e.g., smart phone, tablet, laptop computer, desktop computer, external hard drive)

Name of Electronic Device and Owner/User	Password

Benefit Accounts (e.g., airline miles, railroad miles, hotel rewards, retailer reward/loyalty programs)

Name of Benefit Account Provider, Account Owner, and Web Address	Username	Password/PIN Number

Video Accounts (e.g., YouTube, Vimeo)

Name of Video Account, Account Owner, and Web Address	Username	Password

Virtual Currency Accounts with Cash Value (e.g., Bitcoin, Farmville, Second Life, World of Warcraft)

Name of Virtual Currency site, Account Owner, and Web Address	Username	Password

Website Accounts (e.g., domain names, hosting services, online business accounts, and cloud storage sites such as Dropbox, Google Drive, Apple, iCloud, Flickr, Box)

Name of Website, Account Owner, and Web Address	Username	Password

Other

Name of Other Account	Username	Password