

Digital Assets & Password Organization Worksheet

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Helping Families Plan with Clarity & Confidence

A practical guide to organizing your online life so your loved ones aren't left guessing

In today's world, much of what we own and manage exists online—bank accounts, photos, email, subscriptions, and even business assets. Without proper planning, these digital accounts can be difficult or impossible for loved ones to access after your death.

This worksheet is designed to help you **organize your digital assets** and **document where access information is securely stored**, so your family has the guidance they need when it matters most. However, in most cases you must directly contact the host or custodian of your digital asset and designate your authorized agent.

Important Security Note:

You should not include sensitive information, such as passwords, directly on this worksheet. Instead, this worksheet helps you document *where* passwords are securely stored and *who* has authority to access them.

How to Use This Worksheet

1. Contact the host or custodian of your digital asset to designate your authorized successor agent
 2. Complete each section as thoroughly as possible
 3. Store this worksheet in a **secure location**
 4. Inform your trusted contact where it is kept
 5. Review and update annually or after major life changes
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Section 1: Trusted Digital Access Contact(s)

These are the people you want to handle your digital accounts if you are unable to do so.

Primary Digital Contact

- Name: _____
- Relationship: _____
- Phone: _____
- Email: _____

Backup Contact (Optional)

- Name: _____
- Relationship: _____
- Phone/Email: _____

Section 2: Password Storage Method

For security reasons, do **not** list actual passwords below.

How are your passwords stored? (Check all that apply)

☐ Password Manager

Name of service: _____

How access is granted (emergency access feature, instructions stored elsewhere, etc.):

☐ Physical password list

Location (safe, lockbox, filing cabinet):

☐ Other secure method (describe):

Section 3: Financial & Money-Related Digital Accounts

Account Type	Institution/Platform	Username/E-mail	Notes
Online Banking			
Credit Cards			
Investment Accounts			
Cryptocurrency/Digital Wallet			
Payment Apps (venmo, paypal, etc.)			

Section 4: Email Accounts

Email accounts often control access to many other services.

Provider Email Address Purpose (Personal / Business) Notes

Section 5: Cloud Storage & Digital Files

Cloud services used:

- ☐ Google Drive ☐ iCloud ☐ Dropbox ☐ OneDrive
☐ Other: _____

Types of files stored digitally:

- ☐ Estate planning documents
☐ Tax returns
☐ Business records
☐ Family photos/videos
☐ Personal writings
☐ Other: _____

Notes on folder names or file organization:

Section 6: Social Media & Online Profiles

Platform	Username	Instructions (delete, memorialize, transfer)
Facebook		
Instagram		
Linkedin		
X/Twitter		
Other		

Section 7: Subscriptions & Memberships

Service Website Billing (Monthly / Annual) Notes

Section 8: Business or Professional Digital Assets

(Complete if applicable)

- Business email accounts: _____
- Websites or domains owned: _____
- Website hosting provider: _____
- Online storefronts or platforms: _____
- Business social media accounts: _____

Section 9: Devices & Access Information

Device	Location	Access Instruction
Smartphone		
Laptop/Desktop		
Tablet		
External Devices		

Section 10: Additional Notes & Instructions

Important Legal Note

Access to digital assets often requires **legal authorization**, not just login credentials. State and federal laws may restrict access without proper estate planning documents in place.

This worksheet is intended to supplement—not replace—a legally valid estate plan.

Disclaimer: This worksheet is for informational purposes in SD only. It is not intended as legal advice. You should contact competent legal, tax, or financial advisors.