CHECKLIST

US Wealth Management
U.S. Bank

# Digital estate audit checklist

Keep this information in a locked location to prevent fraud.

Your name: _____

Digital executor's name: _____

## Password manager

List your master password manager account, such as LastPass, if applicable.

| Service | Email address/username | Password |
|---|---|---|
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## Personal devices

List all mobile devices and computers, both personal and work equipment.

| Device description | Username | Password |
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**Investment products and services are:**

**NOT A DEPOSIT · NOT FDIC INSURED · MAY LOSE VALUE · NOT BANK GUARANTEED · NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY**

## Email

List personal and work accounts.

| Service | Email address | Password |
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## Financials

List all your digital accounts, including banking, investing, credit cards, budgeting services, retirement, life insurance and tax preparation. Also include cryptocurrency keys if applicable.

| Service | Email address/username | Password |
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## Financials (continued)

| Service | Email address/username | Password |
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## Utility and property services

| Company | Account number | Email/username | Password |
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## Utility and property services (continued)

| Company | Account number | Email/username | Password |
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## Social media

List all accounts, such as Facebook, LinkedIn and Instagram.

| Website | Email address/username | Password |
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## Online storage

List all cloud-based storage accounts, such as Apple iCloud, Google Drive and Dropbox.

| Website | Email address/username | Password |
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## Online shopping, subscriptions and services

List all accounts and apps, such as Amazon, HelloFresh, Etsy and Uber.

| Website | Email address/username | Password |
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## Entertainment and media

List all accounts and apps, such as Apple Music, Hulu, Netflix and YouTube.

| Website | Email address/username | Password |
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## Security systems

List properties for which you have security systems or codes, such as your primary home, vacation home(s) and business(es).

| Property description | Property address | Security company | System password |
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## Intellectual property and/or other specialty digital assets

List all patents, trademarks, copyrights, videos, photographs, images or presentations.

| Issue/creation date | Reference number | Location | Description |
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## Domain names, websites and blogs

| Credit domain name and registrar/host | Email address/username | Password |
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## Other online accounts and apps

List any accounts not covered above, including P2P payment services such as PayPal and Venmo.

| Website | Email address/username | Password |
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