



Digital Assets Password List

It is important that your spouse/heirs be able to access your online information to manage or delete your “digital assets” after your passing. Use this form to document the websites you use, login information, and to designate who is to handle each account. Store this document in a safe/secure place (DO NOT return this form to Insight Financial Advisors). It is prudent to update this form periodically, and, of course, each time you register for a new website.

Personal Information

Name:	Date Completed:
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Financial Institutions

Example: Banking and investment websites

Website Address	User Name	Password	Designee

E-commerce

Example: Amazon, PayPal, etc.

Website Address	User Name	Password	Designee

Additional copies of this form are available at www.insightfa.com/client-corner/

Personal Computers

Example: Home computer, Apple ID/iTunes, cloud computing, etc.

Website Address	User Name	Password	Designee

Social Media

Example: Email, Facebook, LinkedIn, Twitter, YouTube, etc.

Website Address	User Name	Password	Designee

I have completed a “Digital Legacy Request” and stored it with my estate planning documents. Please reference this document when handling my social media accounts.

Other

Website Address	User Name	Password	Designee

This form is for your personal use only. It is NOT to be returned to Insight Financial Advisors. This form should be kept in a safe/secure place at all times. Insight Financial Advisors is not responsible for the misuse of this information.

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