MANAGING YOUR DIGITAL LEGACY

Keeping Track of Important Digital Assets and Accounts

A guide by safelyfiled

Copyright-SafelyFiled.com, LLC, 888-686-3111, info@safelyfiled.com

It used to be that you only had to consider leaving behind physical items and intangible assets (like bank accounts) when you died. But now, you also have to think about your digital assets and online presence.

This is new. But if you think about it, you'll realize that more and more of your assets are in digital form; music, movies and books that you've purchased rights to, digital records that prove ownership, warranty or other information. And how about this thought? What happens to your Facebook, LinkedIn, Google+, Email account, Blog page and the like when you go? Ever had a friend or family member pass away and yet you still see their presence on those social media sites? Ever wonder how those accounts will be handled and when? Sensitive information is often associated with those accounts so leaving them open could be a risk for others in the family.

This checklist may not only be handy for when you're gone, but also as an up-to-date reminder to yourself of all your digital accounts. Review this checklist periodically to keep it current and as a reminder to close down some accounts that you are no longer using.

The financial consequences of failing to keep your documents in order can be significant. According to the National Association of Unclaimed Property Administrators, state treasurers currently hold $32.9 billion in unclaimed bank accounts and other assets. And if you include unclaimed pension benefits and life insurance proceeds, the number climbs to $58 billion.

Many law firms now are also encouraging people to keep their digital legacy in mind and cover those assets in their will. SafelyFiled can help you with your digital legacy.

Copyright-SafelyFiled.com, LLC, 888-686-3111, info@safelyfiled.com

Managing Your Digital Legacy Checklist

Use this checklist to help you think about and record the necessary information pertaining to your digital assets and account information. Download this checklist and fill it out. After you've recorded the information on this checklist, upload it into your SafelyFiled account and share this document with whomever may need it when necessary. **This checklist, like all of the other documents loaded into SafelyFiled, will be stored encrypted and kept safe from hackers and viruses. This is important, as the information you record here is extremely sensitive. Do not email this completed checklist. Upload it directly into your SafelyFiled account via computer or the Android or IPhone Apps.** You might also want to set a reminder on this file after you upload it to remind yourself to update it periodically so it's kept up-to-date.

If you don't have a SafelyFiled account or don't want to put this checklist in your account, you may decide to print it. If you do, make sure you keep it in a very safe place like a safe deposit box.

Finally, don't forget that your computer hard drive is subject to spyware, so make sure you **delete the copy on your computer/phone/tablet after you've uploaded or printed it.**

Copyright-SafelyFiled.com, LLC, 888-686-3111, info@safelyfiled.com

Password Vault Info

If you use a password vault such as LastPass.com, you may want to record your vault info here. Password vaults are a great way to track all of your online accounts and login information with one master password. If you ever lose the master password for that vault, you will have to start from scratch, as most password vault companies, for extra security purposes, will not store your master password for you. If you use a vault, this may be the only info you need to record on this checklist other than credit card numbers and specific digital assets.

Vault Name	Website	Login Name	Password
Example: Lastpass	Lastpass.com		

Copyright-SafelyFiled.com, LLC, 888-686-3111, info@safelyfiled.com

Business Account Info

If you own your own business, or have accounts that are specifically associated with your company/job, you may want to list all of those accounts separately here so your family knows that these are specific to your business/job.

Web Site or Institution	Account Name	Login Name	Password	Business Contact Info

Copyright-SafelyFiled.com, LLC, 888-686-3111, info@safelyfiled.com

Digital Assets

Use this section to record what digital assets you have such as music, books, stock photography purchased, and any digital art or work you've created that you have stored someplace.

Asset Type	Account or Web Address	Login Name	Password	Offline Storage Location
Example: Itunes	Itunes.com			My Laptop
Example: Kindle books	Amazon.com			My Kindle Fire

Financial Accounts:

Record your financial information here such as bank, credit union, Paypal, brokerage and, IRA accounts, etc.

Institution Name	Web Address	Login Name	Password/Pin	Account Number	Account Type	Comments/ Instructions
Example: USA Bank	Bankusa.com	1234	12343	12345678	Checking & Savings	Routing number 12344323

Social Media and Email Accounts:

Capture your social medial information to include Facebook, LinkedIn, Blog site, email , contact lists, etc. Leave your wishes for closing down these sites. (Note: some accounts may, in their terms of service, have a statement that no one else can log in and close your account other than you. Be sure to read the terms of service to ensure you're loved ones don't break any contractual obligations or laws.)

Media Type	Web address	Login Name	Password	Instructions/ Comments
Example: Facebook	Facebook.com/testexample			Please tell all of my friends and family that I love them and then close down this account. Or, I have left specific instructions for this in my will.

Copyright-SafelyFiled.com, LLC, 888-686-3111, info@safelyfiled.com

Online Monthly Bill Paying Accounts:

Many utilities, automobile, mortgage, insurance and other monthly billing services now provide a way for you to pay your accounts online. If you use such services, capture the information here so that your loved ones or legal representative can take care of these financial obligations more easily.

Account Type	Web Address	Account Number	Login & Password	Bill Due
Example: Electric Bill	Electriccompany.com	12345532	12342/23423	First of every month

Copyright-SafelyFiled.com, LLC, 888-686-3111, info@safelyfiled.com

Debit and Credit Cards :

In the event your wallet is ever stolen, it would be a good idea to have your credit and debit card numbers, expiration date and bank contact info kept here for quick access to closing down accounts.

Credit Card Type	Name On Card	Card Number	Expiration Date	Telephone Number	Website
Example: Mastercard/Credit/ Debit	Joe W. Smith	1111111111111111	12/2014	8885555555	Bankusa.com
Example: JCPenny					

Copyright-SafelyFiled.com, LLC, 888-686-3111, info@safelyfiled.com

Other Account Info

Use this area to record any other information that we've not specifically identified. They are free form text fields that you can fill in however you want. Feel free to fill in your own column headings. You may want to consider adding headings for account, login, password and instructional information. Managing Your Digital Legacy Checklist

Heading 1	Heading 2	Heading 3	Heading 4	Heading 5
Example: amazon.com				

Copyright-SafelyFiled.com, LLC, 888-686-3111, info@safelyfiled.com

Managing Your Digital Legacy Checklist

Heading 1	Heading 2	Heading 3	Heading 4	Heading 5

Copyright-SafelyFiled.com, LLC, 888-686-3111, info@safelyfiled.com