

Digital Assets Estate Planning Questionnaire

Personal Information

Full Name

Email Address

Phone Number

Address

Digital Assets Overview

List of Email Accounts (service, username/email)

List of Social Media Accounts (platform, username)

List of Financial Accounts (online banking, PayPal, crypto, etc.)

Cloud Storage Accounts

Other Important Digital Accounts

Instructions & Access

Preferred Methods for Accessing Digital Assets

Locations of Passwords or Instructions

List Trusted Person(s) to Access Your Digital Assets

Special Requests or Notes

Special Instructions for Specific Assets

Additional Notes