

Digital Estate Planning Questionnaire

	Client	Spouse
Name:		
Residence:	_____	_____
	_____	_____
	_____	_____
Home Phone Number Voice Mail Password	_____	_____
	_____	_____
Cell Phone Number Cell Phone Password Voicemail # Voicemail Password	_____	_____
	_____	_____
	_____	_____
	_____	_____
<u>Computers:</u>		
Home Computer User-name Password Additional User Names & Passwords	_____	_____
	_____	_____
	_____	_____
	_____	_____
Home Computer (2) User-name Password Additional User-names & Passwords:	_____	_____
	_____	_____
	_____	_____
	_____	_____
Office Computer User-name Password Additional User Names & Passwords:	_____	_____
	_____	_____
	_____	_____
	_____	_____
<u>E-mail Accounts:</u>		
e-mail (home) Provider URL User-name Password	_____	_____
	_____	_____
	_____	_____
	_____	_____
e-mail (work) Provider URL User-name Password	_____	_____
	_____	_____
	_____	_____
	_____	_____

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E-mail Accounts:		
e-mail (other)	_____	_____
Provider URL	_____	_____
User-name	_____	_____
Password	_____	_____
e-mail (other)	_____	_____
Provider URL	_____	_____
User-name	_____	_____
Password	_____	_____
Social Networking:		
LinkedIn		
User-name	_____	_____
Password	_____	_____
Facebook		
User-name	_____	_____
Password	_____	_____
My Space		
User-name	_____	_____
Password	_____	_____
Twitter		
User-name	_____	_____
Password	_____	_____
YouTube		
User-name	_____	_____
Password	_____	_____

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Financial Programs:		
Quiken: User-name Password	_____ _____ _____	_____ _____ _____
Microsoft Money User-name Password	_____ _____ _____	_____ _____ _____
Other: User-name Password	_____ _____ _____	_____ _____ _____
Financial Accounts:		
ATM/Debit Card #1 Card Number PIN	_____ _____	_____ _____
ATM/Debit Card #2 Card Number PIN	_____ _____	_____ _____
Bank Account #1 Bank Name Account Number Web Address User-name Password	_____ _____ _____ _____ _____	_____ _____ _____ _____ _____
Bank Account #2 Bank Name Account Number Web Address User-name Password	_____ _____ _____ _____ _____	_____ _____ _____ _____ _____
Brokerage Account #1 Bank Name Account Number Web Address User-name Password	_____ _____ _____ _____ _____	_____ _____ _____ _____ _____

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<u>Financial Accounts cont'd:</u>		
Brokerage Account #2 Bank Name Account Number Web Address User-name Password	_____ _____ _____ _____ _____ _____	_____ _____ _____ _____ _____ _____
Mutual Fund Account #1 Broker Name Account Number Web Address User-name Password	_____ _____ _____ _____ _____ _____	_____ _____ _____ _____ _____ _____
Mutual Fund Account #2 Broker Name Account Number Web Address User-name Password	_____ _____ _____ _____ _____ _____	_____ _____ _____ _____ _____ _____
<u>Online Shopping & Auction Accounts:</u>		
Account Name (ex. Amazon, Craigslist, eBay, PayPal etc.) Website User-name Password	_____ _____ _____ _____	_____ _____ _____ _____
Account Name (ex. Amazon, Craigslist, eBay, PayPal etc.) Website User-name Password	_____ _____ _____ _____	_____ _____ _____ _____
<u>Tax Preparation Software:</u>		
Turbo Tax: User-name Password	_____ _____ _____	_____ _____ _____
H&R Block Tax Prep: User-name Password	_____ _____ _____	_____ _____ _____

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Credit Cards:		
Credit Card #1		
Name	_____	_____
Account Number	_____	_____
Web Address	_____	_____
User-name	_____	_____
Password	_____	_____
	Client	Spouse
Credit Card #2		
Name	_____	_____
Account Number	_____	_____
Web Address	_____	_____
User-name	_____	_____
Password	_____	_____
<u>Domain Names (websites, blogs etc):</u>		
Domain Name & Registrar	_____	_____
Host Username	_____	_____
Passwords	_____	_____
	_____	_____
Other (Flickr, Snapfish, etc.)		
Web Site	_____	_____
User-name	_____	_____
Password	_____	_____
On-line storage accounts		
Web site	_____	_____
User-name	_____	_____
Password	_____	_____
	_____	_____