

# Digital Assets Workbook

for

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as of

\_\_\_\_\_, 2018



## **Marks Gray, P.A.**

1200 Riverplace Boulevard, Suite 800, Jacksonville, Florida 32207 - 904-807-2183

2215 Third Street South, Suite 101, Jacksonville Beach, FL 32250 - 904-285-8760

Mailing: Post Office Box 447, Jacksonville, FL 32201: Fax: 904-399-8440

*Thank you for allowing us to help you with your estate planning. We encourage you to complete this workbook to assist your family with the future management of your estate. If you have any questions, please do not hesitate to contact us.*

### VITAL INFORMATION

Name:

Date of birth:

Place of Birth:

SSN:

Current address:

City:

State:

ZIP Code:

Phone:

Cell:

Email:

U.S. Citizen: Yes  No

If No, Country of Origin:

### COMPUTER/ELECTRONICS

Home Computer:

User ID:

Password:

iPad/Tablet:

User ID:

Password:

iPhone/Android:

User ID:

Password:

### PASSWORD MANAGER

Website or App:

User ID:

Password:

If passwords are handwritten or printed, indicate location where kept (paper notebook, Word document, etc.)

### CLOUD DOCUMENT MANAGEMENT

(GOOGLE DOCS, ICLOUD, EVERNOTE, MICROSOFT ONEDRIVE, DROPBOX, ETC.)

Website:

User ID:

Password:

Website:

User ID:

Password:

### HOME SECURITY SYSTEM

Company:

Account Number:

Phone:

In-Home Password/PIN:

Website:

User ID:

Password:



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**COMPUTER/ELECTRONICS PASSWORDS**

Home Computer:

User ID:

Password:

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iPad/Tablet:

User ID:

Password:

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iPhone/Android:

User ID:

Password:

**EMAIL ACCOUNTS (GOOGLE, YAHOO, AOL, ETC.)**

Website:

User ID:

Password:

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Website:

User ID:

Password:

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Website:

User ID:

Password:

**SOCIAL MEDIA ACCOUNTS (FACEBOOK, TWITTER, LINKEDIN, INSTAGRAM, GOOGLE+, ETC.)**

Website:

User ID:

Password:

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Website:

User ID:

Password:

---

Website:

User ID:

Password:

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Website:

User ID:

Password:

---

Website:

User ID:

Password:

**MEDICAL PORTALS (DOCTORS, HOSPITALS, LABS)**

Website:

User ID:

Password:



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Website:

User ID:

Password:

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Website:

User ID:

Password:

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**PROFESSIONAL ASSOCIATIONS/MEMBERSHIPS/SUBSCRIPTIONS**

Organization/Association:

Manager Name:

Phone:

Website:

User ID:

Password:

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Organization/Association:

Manager Name:

Phone:

Website:

User ID:

Password:

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Organization/Association:

Manager Name:

Phone:

Website:

User ID:

Password:

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**MONEY MANAGEMENT ACCOUNTS (PAYPAL, MINT, GOOGLE WALLET, WE PAY)**

Website:

User ID:

Password:

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Website:

User ID:

Password:

---

Website:

User ID:

Password:

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**SOFTWARE LICENSES (MICROSOFT OFFICE, ADOBE, IWORKS, QUICKBOOKS, ETC.)**

Company/Website:

User ID:

Password:

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Company/Website:

User ID:

Password:

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Company/Website:

User ID:

Password:

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**MESSAGING SERVICES (SKYPE, WHATSAPP, SNAPCHAT, ETC.)**

Website:

Phone Number:

Password:

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Website:

Phone Number:

Password:

---

Website:

Phone Number:

Password:

---

**VIDEO STREAMING ACCOUNTS (NETFLIX, HULU, AMAZON PRIME, ETC.)**

Provider/Website:

User ID:

Password:

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Provider/Website:

User ID:

Password:

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Provider/Website:

User ID:

Password:

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Provider/Website:

User ID:

Password:

---

Provider/Website:

User ID:

Password:

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**MUSIC STREAMING ACCOUNTS (ITUNES, PANDORA, SPOTIFY, ETC.)**

Provider/Website:

User ID:

Password:

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Provider/Website:

User ID:

Password:

---

Provider/Website:

User ID:

Password:



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Provider/Website:

User ID:

Password:

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Provider/Website:

User ID:

Password:

---

**ONLINE SHOPPING ACCOUNTS (AMAZON, EBAY, WALMART, ETSY, ETC.)**

Store Website:

User ID:

Password:

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Store Website:

User ID:

Password:

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Store Website:

User ID:

Password:

---

Store Website:

User ID:

Password:

---

Store Website:

User ID:

Password:

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**TRAVEL/TICKETS/REWARDS (AIRLINES, CAR RENTALS, TICKETMASTER, ETC.)**

Provider/Website:

User ID:

Password:

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Provider/Website:

User ID:

Password:

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Provider/Website:

User ID:

Password:

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**FOOD DELIVERY SERVICES (FRESH DIRECT, BLUE APRON, COSTCO, ETC.)**

Provider/Website:

User ID:

Password:

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Provider/Website:

User ID:

Password:



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**GAMING (XBOX LIVE, PLAYSTATION PLUS, ETC.)**

Provider/Website:

User ID:

Password:

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Provider/Website:

User ID:

Password:

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Provider/Website:

User ID:

Password:

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Provider/Website:

User ID:

Password:

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Provider/Website:

User ID:

Password:

**MISCELLANEOUS ONLINE ACCOUNTS**

Website:

User ID:

Password:

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Website:

User ID:

Password:

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Website:

User ID:

Password:

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Website:

User ID:

Password:

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Website:

User ID:

Password:

**NOTES AND SPECIAL INSTRUCTIONS**

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