

Today, many financial, medical, and other important records are kept electronically. Many people no longer receive paper invoices and often bills are paid online. If something happened to you, would anyone know what your passwords are and how to access your online accounts? Would the agent on your financial power of attorney be able to access your email and bank accounts and pay your bills for you if needed? What about Facebook, Twitter, and other social media? Would someone know how to shut down those accounts, if necessary?

I have a hard time remembering my own user ids and passwords; I certainly can't expect the person I've named as my agent on my financial power of attorney or the executor I've named in my will to remember them! I know it's unwise to use the same password for multiple accounts, so the list keeps growing!

We've provided this list as a starting point to help you and your attorney-in-fact, and/or executor of your will keep track of your accounts, User IDs and Passwords.

If you keep a paper copy of this document, be sure to keep it in a safe, secure place with your other important documents.

If you want to keep track of your user ids and passwords electronically, many smart phones nowadays are equipped with password storage capabilities. You can also utilize password management software; there are both free and paid programs available online.

### ACCOUNT LISTING

#### Bank Accounts:

Name of Bank: \_\_\_\_\_

URL: \_\_\_\_\_

User ID & PW: \_\_\_\_\_

Accounts with this Bank:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name of Bank: \_\_\_\_\_

URL: \_\_\_\_\_

User ID & PW: \_\_\_\_\_

Accounts with this Bank:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name of Bank: \_\_\_\_\_

URL: \_\_\_\_\_

User ID & PW: \_\_\_\_\_

Accounts with this Bank:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name of Bank: \_\_\_\_\_

URL: \_\_\_\_\_

User ID & PW: \_\_\_\_\_

Accounts with this Bank:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Investment/Retirement Accounts:

Name of Fiduciary: \_\_\_\_\_  
URL: \_\_\_\_\_  
User ID & PW: \_\_\_\_\_  
Accounts with this Institution:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name of Fiduciary: \_\_\_\_\_  
URL: \_\_\_\_\_  
User ID & PW: \_\_\_\_\_  
Accounts with this Institution:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name of Fiduciary: \_\_\_\_\_  
URL: \_\_\_\_\_  
User ID & PW: \_\_\_\_\_  
Accounts with this Institution:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name of Fiduciary: \_\_\_\_\_  
URL: \_\_\_\_\_  
User ID & PW: \_\_\_\_\_  
Accounts with this Institution:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Credit cards or other creditor accounts:

Name of Creditor: \_\_\_\_\_  
URL: \_\_\_\_\_  
User ID & PW: \_\_\_\_\_  
Account Type: \_\_\_\_\_

Name of Creditor: \_\_\_\_\_  
URL: \_\_\_\_\_  
User ID & PW: \_\_\_\_\_  
Account Type: \_\_\_\_\_

Name of Creditor: \_\_\_\_\_  
URL: \_\_\_\_\_  
User ID & PW: \_\_\_\_\_  
Account Type: \_\_\_\_\_

Name of Creditor: \_\_\_\_\_  
URL: \_\_\_\_\_  
User ID & PW: \_\_\_\_\_  
Account Type: \_\_\_\_\_

Social Media:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

User IDs & PWs:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Misc:

Phone: \_\_\_\_\_  
Email: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_