

# FINANCIAL & DIGITAL ACCOUNTS LOG

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## Why should I keep a log of financial and digital accounts?

Oh, dear, are you really asking this question?

If you are over the age of 16, you probably have several financial accounts – like bank accounts, direct deposit payroll accounts, retirement accounts, investment accounts, life insurance accounts, stock accounts, etc.

Even if you are over the age of 50, you probably use several electronic devices – like smart phones, computers, iPads, tablets, etc.

And, whether you like it or not, you probably have many digital or “online” accounts, and these **are growing every day**. In today’s world, you cannot escape having online:

Utility accounts (like electric, water, cable)

TV accounts (like Netflix, Amazon Prime, Hulu, etc.)

Cellular and Computer Accounts (like AT&T, Verizon, Apple, Google Play, etc.)

Vendor Accounts (like Amazon, Walmart, Costco, Sam’s Club, B&H Photo, Dell, and every other vendor from whom you have made a purchase in the past 10 years)

Loan Accounts (like mortgage, auto, credit card, etc.)

Email accounts (like aol, gmail, msn, etc.)

Bank accounts  
Investment accounts

Stock accounts

**Social Security Account** (if you are over the age of 55 or disabled, you need an online SS Acct)

Medicare Account

Insurance Accounts - primary health, supplemental health (like AFLAC or Medicare Supplement), prescription, life, annuity, etc.)

Health Accounts - hospital portals, physician portals, laboratory portals, etc.

In my practice of life planning, elder law, trusts, and probate estates, I meet people every day and discuss their numerous financial and digital accounts. If you have a comprehensive will or trust, you probably had one or more conversations for what assets you hold and where they are located. Even then, is this information gathered into one, single place? And does it include every single asset and account? Does it ever change? If it changes, do you record the changes somewhere?

Some people continue to receive paper statements, but how long do you keep them? Some people do everything “online,” but how will we access them if something happens to you? Some people do everything on their computer or phone, but how will we get into your computer or phone if something happens to you and we do not know your password and what accounts to look for?

You don’t have to think long to realize that **YOU** are not only the best “library” of information about your accounts, you are often the **ONLY** library for this information. If you are injured, lose some or all of your memory, or die, how will your agents and professionals help you if they cannot find, access, or manage your financial and digital accounts? Are YOU finding it easy to keep track of all your accounts?

These are very important questions, and they are becoming even more important every day. How many times every day do you ask yourself the question, “what is the password to this account?” Or, “where is that statement?”

If someone must help you with health care, they **need** access to your Social Security, Medicare, health insurance, and health care provider accounts. If someone must help you with financial affairs, they **need** access to your bank, investment, stock, retirement, loan, utility, and vendor accounts.

If something catastrophic happens and you must apply for Medicaid benefits in a nursing home, your agents and professionals **need** access to your Social Security, Medicare, health insurance, bank, investment, stock, retirement, loan, and utility accounts.

## Keeping Track of Financial and Digital Accounts

This Log is written by a life planning, elder law, and probate estate lawyer. It is intended to call attention to the kinds of financial and digital accounts frequently encountered in these areas and provide a simple, convenient place for recording critical information that you frequently need, and your agents, fiduciaries, and lawyers **WILL** need in order to assist with or manage your affairs if you are disabled, incapacitated, or deceased. Each of us will fall into at least one of those categories. We might as well get prepared.

This Log is also written to assist you in keeping track of the financial and digital accounts that seem to multiply every day.

The following are suggestions for using the Log:

- Keep this booklet **SAFE & SECURE**. It contains very private information. Do not carry it with you. Do **NOT** place it in a safe deposit box (if you are incapacitated or die, no one can get into your safe deposit box). Do not call attention to it. If you have a home safe, put it in the safe. If you do not have a home safe, put it with your life planning documents (will, trust, etc.)

- When first completing this Log, keep the booklet handy and near the area where you review your financial and digital accounts. This may be where you place your mail before you review it. Or, where you keep your checkbook. It may be next to your computer. After completing the Log, MOVE IT and place it somewhere SAFE & SECURE.
  
- When you review a written statement, fill out the section in this Log that corresponds to the account. For example, when you get a bank statement, fill out the section for that bank statement. When you get a statement regarding insurance, fill out the section for insurance.
  
- Whenever you access a digital or online account, whether on your computer or phone, check to make sure that account is recorded in this Log.
  
- Whenever you sign up for a new digital or online account, add it to this Log.
  
- Whenever you change the username or password for a digital or online account, change it in this Log.
  
- Be sure to keep track of your email accounts! If you delete an email account, some of your digital or online accounts may be tied to that email address – you need to change the username or email associated with each of those accounts.

Are you ready to get started?

First, let's record your personal information.

Name: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Next, let's consider the kind of financial and digital accounts that you have.



## **Types of Financial and Digital Accounts**

This Log is organized by types of financial and digital accounts, and those types are listed in alphabetical order. Several pages are provided for each type of account, and areas are included to record the original account information and changes to that information over time.

### **COMPUTER & PHONE ACCESS:**

**Computer Username & passwords**

**Phone Numbers & passwords**

### **DOCUMENT ACCESS:**

**“Cloud” Document Repository Accounts**

### **EMAIL ACCOUNTS**

### **FINANCIAL ACCOUNTS:**

#### **Bank Accounts:**

Checking Account(s)

Savings Account(s)

Money Market Account(s)

Certificates of Deposit

Be sure to include online bank accounts!

**Investment Accounts:**

Accounts held by a financial planner

Accounts held directly with a brokerage (such as TD Ameritrade, Vanguard, Fidelity, etc.)

**Retirement Accounts:**

Accounts held by an employer or former employer

Accounts held by the government (such as TSA accounts)

IRA's. including inherited IRA's

**Social Security Account:**

The author recommends that anyone over the age of 55 establish an online Social Security Account. You will be very surprised by the amount of information available in this account and the number of tasks you can do with this account. You or your helpers will be extremely surprised to find out how difficult it is to do many things with Social Security if the beneficiary herself or himself is not available or able to do it (such as get a statement of benefits, change the bank account for direct deposits, etc.).

## HEALTH CARE ACCOUNTS:

- Hospital Accounts
- Physician Accounts
- Laboratory Accounts
- Healthcare.gov (marketplace) Account
- Medicare Account

## INSURANCE ACCOUNTS:

- Health insurance/Medicare
- Life Insurance
- Automobile Insurance
- Homeowner's/Renter's Insurance

## LOAN ACCOUNTS:

- Mortgage loan
- Automobile loan
- Credit cards

## UTILITY ACCOUNTS:

- Telephone/cellular
- Electric
- Gas
- Water
- Cable/internet

**TV/CABLE ACCOUNTS:**

Cable/internet

Streaming services – Netflix, Amazon, HBO,  
Showtime, Hulu, etc.

**VENDOR ACCOUNTS:** Bills you pay online or  
purchases you make online

To use this Log effectively, please record how you keep your records.

\_\_\_\_\_ I DO NOT USE ONLINE ACCOUNTS – I keep everything on paper.

\_\_\_\_\_ I USE ONLINE ACCOUNTS. Information about these accounts is in this Log.

## COMPUTER & PHONE ACCESS:

I have \_\_\_\_\_ computers. They are:

Name/description: \_\_\_\_\_

Password: \_\_\_\_\_

Changed to: \_\_\_\_\_

On: \_\_\_\_\_

Changed to: \_\_\_\_\_

On: \_\_\_\_\_

Changed to: \_\_\_\_\_

On: \_\_\_\_\_

Name/description: \_\_\_\_\_

Password: \_\_\_\_\_

Changed to: \_\_\_\_\_

On: \_\_\_\_\_

Changed to: \_\_\_\_\_

On: \_\_\_\_\_

Changed to: \_\_\_\_\_

On: \_\_\_\_\_

Name/description: \_\_\_\_\_

Password: \_\_\_\_\_

Changed to: \_\_\_\_\_

On: \_\_\_\_\_

Changed to: \_\_\_\_\_

On: \_\_\_\_\_

Changed to: \_\_\_\_\_

On: \_\_\_\_\_

I have \_\_\_\_\_ **phones**. They are:

Name/description: \_\_\_\_\_

Number: \_\_\_\_\_

Password: \_\_\_\_\_

Changed to: \_\_\_\_\_

On: \_\_\_\_\_

Changed to: \_\_\_\_\_

On: \_\_\_\_\_

Name/description: \_\_\_\_\_

Number: \_\_\_\_\_

Password: \_\_\_\_\_

Changed to: \_\_\_\_\_

On: \_\_\_\_\_

Changed to: \_\_\_\_\_

On: \_\_\_\_\_

I have \_\_\_\_\_ **ipads or tablets**. They are:

Name/description: \_\_\_\_\_

Password: \_\_\_\_\_

Changed to: \_\_\_\_\_

On: \_\_\_\_\_

Changed to: \_\_\_\_\_

On: \_\_\_\_\_

Name/description: \_\_\_\_\_

Password: \_\_\_\_\_

Changed to: \_\_\_\_\_

On: \_\_\_\_\_

Changed to: \_\_\_\_\_

On: \_\_\_\_\_

Name/description: \_\_\_\_\_

Password: \_\_\_\_\_

Changed to: \_\_\_\_\_

On: \_\_\_\_\_

Changed to: \_\_\_\_\_

On: \_\_\_\_\_



## DOCUMENT ACCESS

\_\_\_\_\_ I store documents “in the cloud.”

\_\_\_\_\_ I do not store documents “in the cloud.”

Name of repository:

\_\_\_\_\_

Web address (url):

\_\_\_\_\_

Username:

\_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Password:

\_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

## EMAIL ACCOUNTS:

(1) Email address:

\_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_

Password:

\_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_

(2) Email Address:

\_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_

Password: \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_

(3) Email Address:

\_\_\_\_\_  
Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Password: \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

(4) Email Address:

\_\_\_\_\_  
Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Password: \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

(5) Email Address:

\_\_\_\_\_  
Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Password: \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

(6) Email Address:

\_\_\_\_\_  
Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Password: \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

## FINANCIAL ACCOUNTS:

### Bank Accounts:

(1) Name of Bank: \_\_\_\_\_

Branch location: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

(2) Name of Bank: \_\_\_\_\_

Branch location: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

(3) Name of Bank: \_\_\_\_\_  
Branch location: \_\_\_\_\_  
Type of account: \_\_\_\_\_  
Account #: \_\_\_\_\_  
Type of account: \_\_\_\_\_  
Account #: \_\_\_\_\_  
Type of account: \_\_\_\_\_  
Account #: \_\_\_\_\_  
Type of account: \_\_\_\_\_  
Account #: \_\_\_\_\_

(4) Name of Bank: \_\_\_\_\_  
Branch location: \_\_\_\_\_  
Type of account: \_\_\_\_\_  
Account #: \_\_\_\_\_  
Type of account: \_\_\_\_\_  
Account #: \_\_\_\_\_  
Type of account: \_\_\_\_\_  
Account #: \_\_\_\_\_  
Type of account: \_\_\_\_\_  
Account #: \_\_\_\_\_

**Investment Accounts:**

(1) Name of Institution: \_\_\_\_\_

Advisor: \_\_\_\_\_

Telephone #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

(2) Name of Institution: \_\_\_\_\_

Advisor: \_\_\_\_\_

Telephone #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

**Retirement Accounts:**

(1) Name of Institution: \_\_\_\_\_

Advisor: \_\_\_\_\_

Telephone #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

(2) Name of Institution: \_\_\_\_\_

Advisor: \_\_\_\_\_

Telephone #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_



(3) Name of Institution: \_\_\_\_\_

Advisor: \_\_\_\_\_

Telephone #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

(4) Name of Institution: \_\_\_\_\_

Advisor: \_\_\_\_\_

Telephone #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

Type of account: \_\_\_\_\_

Account #: \_\_\_\_\_

## DIGITAL OR ONLINE ACCOUNTS:

\_\_\_\_\_ I use online accounts.

\_\_\_\_\_ I do not use online accounts.

## Master Password Repositories:

Do you use a password repository, such as LastPass, Keeper, Dashlane, Roboform, etc.? If so, what is your

Master Password: \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Do you keep passwords in another source, such as Outlook, a password list saved to your phone, etc? If so,

Where do you keep this? \_\_\_\_\_

\_\_\_\_\_

How do we find it? \_\_\_\_\_

**WHAT CELLULAR TELEPHONE NUMBER or email address do you use for “two factor authentication”?**

\_\_\_\_\_

**Online Bank Accounts:**

(1) Name of Bank: \_\_\_\_\_

Web address (url): \_\_\_\_\_

Types of Accounts with (last 4 digits of account numbers): \_\_\_\_\_

\_\_\_\_\_

Username: \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Password: \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

(2) Name of Bank: \_\_\_\_\_

Web address (url): \_\_\_\_\_

Types of Accounts with (last 4 digits of account numbers): \_\_\_\_\_

\_\_\_\_\_

Username: \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Password: \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_

(3) Name of Bank: \_\_\_\_\_  
Web address (url): \_\_\_\_\_  
Types of Accounts with (last 4 digits of account  
numbers): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Username: \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_

Password: \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_

(4) Name of Bank: \_\_\_\_\_

Web address (url): \_\_\_\_\_

Types of Accounts with (last 4 digits of account numbers): \_\_\_\_\_

\_\_\_\_\_

Username: \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Password: \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

## Online Investment Accounts:

(1) Name of Institution: \_\_\_\_\_

Web address (url): \_\_\_\_\_

Types of Accounts with (last 4 digits of account numbers): \_\_\_\_\_

\_\_\_\_\_

Username: \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Password: \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

(2) Name of Institution: \_\_\_\_\_

Web address (url): \_\_\_\_\_

Types of Accounts with (last 4 digits of account numbers): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Username: \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_

Password: \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_

(3) Name of Institution: \_\_\_\_\_  
Web address (url): \_\_\_\_\_  
Types of Accounts with (last 4 digits of account  
numbers): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Username: \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_

Password: \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_

**Online Retirement Accounts:**

(1) Name of Institution: \_\_\_\_\_

Web address (url): \_\_\_\_\_

Types of Accounts with (last 4 digits of account numbers): \_\_\_\_\_

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

Username: \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Password: \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

Changed to \_\_\_\_\_

On \_\_\_\_\_

(2) Name of Institution: \_\_\_\_\_

Web address (url): \_\_\_\_\_

Types of Accounts with (last 4 digits of account numbers): \_\_\_\_\_

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



Username: \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_

Password: \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_

(3) Name of Institution: \_\_\_\_\_  
Web address (url): \_\_\_\_\_  
Types of Accounts with (last 4 digits of account  
numbers): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Username: \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_

Password: \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_  
Changed to \_\_\_\_\_  
On \_\_\_\_\_

## Online Social Security Account:

Email address associated with acct:

\_\_\_\_\_

User name: \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

Password: \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

**Online Health Care Accounts:**

(1) Health Care Provider: \_\_\_\_\_

This provider treats me for \_\_\_\_\_

Web address (url) \_\_\_\_\_

Email address associated with acct:

\_\_\_\_\_

User name: \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

Password: \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

(2) Health Care Provider: \_\_\_\_\_

This provider treats me for \_\_\_\_\_

Web address (url) \_\_\_\_\_

Email address associated with acct:

\_\_\_\_\_

User name: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

Password: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

(3) Health Care Provider: \_\_\_\_\_  
This provider treats me for \_\_\_\_\_  
\_\_\_\_\_  
Web address (url) \_\_\_\_\_

Email address associated with acct:  
\_\_\_\_\_

User name: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

Password: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

**Online Insurance Accounts:**

(1) Name of Ins Company: \_\_\_\_\_  
Type of Insurance \_\_\_\_\_  
Web address (url) \_\_\_\_\_

Email address associated with acct:  
\_\_\_\_\_

User name: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

Password: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

(2) Name of Ins Company: \_\_\_\_\_  
Type of Insurance \_\_\_\_\_  
Web address (url) \_\_\_\_\_

Email address associated with acct:  
\_\_\_\_\_

User name: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

Password: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

(3) Name of Ins Company: \_\_\_\_\_  
Type of Insurance \_\_\_\_\_  
Web address (url) \_\_\_\_\_

Email address associated with acct:  
\_\_\_\_\_

User name: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

Password: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

**Online Loan Accounts:**

(1) Name of Company: \_\_\_\_\_  
Type of loan \_\_\_\_\_  
Web address (url) \_\_\_\_\_

Email address associated with acct:  
\_\_\_\_\_

User name: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

Password: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

(2) Name of Company: \_\_\_\_\_  
Type of loan \_\_\_\_\_  
Web address (url) \_\_\_\_\_

Email address associated with acct:  
\_\_\_\_\_

User name: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

Password: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

(3) Name of Company: \_\_\_\_\_  
Type of loan \_\_\_\_\_  
Web address (url) \_\_\_\_\_

Email address associated with acct:  
\_\_\_\_\_

User name: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

Password: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_



## Social Media Accounts:

(1) Name of Media: \_\_\_\_\_  
I use this account for \_\_\_\_\_  
\_\_\_\_\_

Email address associated with acct:  
\_\_\_\_\_

User name: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

Password: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

(2) Name of Media: \_\_\_\_\_  
I use this account for \_\_\_\_\_  
\_\_\_\_\_

Email address associated with acct:  
\_\_\_\_\_

User name: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

Password: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

(3) Name of Media: \_\_\_\_\_  
I use this account for \_\_\_\_\_  
\_\_\_\_\_

Email address associated with acct:  
\_\_\_\_\_

User name: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

Password: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

**Online Television/Cable Accounts:**

(1) Name of Company: \_\_\_\_\_

Type of service from this company: \_\_\_\_\_

Web address (url) \_\_\_\_\_

Email address associated with acct:

\_\_\_\_\_

User name: \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

Password: \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

(2) Name of Company: \_\_\_\_\_

Type of service from this company: \_\_\_\_\_

Web address (url) \_\_\_\_\_

Email address associated with acct:

\_\_\_\_\_

User name: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

Password: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

(3) Name of Company: \_\_\_\_\_  
Type of service from this company: \_\_\_\_\_  
Web address (url) \_\_\_\_\_

Email address associated with acct:  
\_\_\_\_\_

User name: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

Password: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

**Online Utility Accounts:**

(1) Name of Company: \_\_\_\_\_

Type of service from this company: \_\_\_\_\_

Web address (url) \_\_\_\_\_

Email address associated with acct:

\_\_\_\_\_

User name: \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

Password: \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

(2) Name of Company: \_\_\_\_\_

Type of service from this company: \_\_\_\_\_

Web address (url) \_\_\_\_\_

Email address associated with acct:

\_\_\_\_\_

User name: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

Password: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

(3) Name of Company: \_\_\_\_\_  
Type of service from this company: \_\_\_\_\_  
Web address (url) \_\_\_\_\_

Email address associated with acct:  
\_\_\_\_\_

User name: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

Password: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

**Online Vendor Accounts:**

(1) Name of Company: \_\_\_\_\_  
Type of service from this company: \_\_\_\_\_  
Web address (url) \_\_\_\_\_

Email address associated with acct:  
\_\_\_\_\_

User name: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

Password: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

(2) Name of Company: \_\_\_\_\_  
Type of service from this company: \_\_\_\_\_  
Web address (url) \_\_\_\_\_

Email address associated with acct:  
\_\_\_\_\_

User name: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

Password: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

(3) Name of Company: \_\_\_\_\_  
Type of service from this company: \_\_\_\_\_  
Web address (url) \_\_\_\_\_

Email address associated with acct:  
\_\_\_\_\_

User name: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_

Password: \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_  
Changed on \_\_\_\_\_  
To \_\_\_\_\_



(4) Name of Company: \_\_\_\_\_  
Type of service from this company: \_\_\_\_\_  
Web address (url) \_\_\_\_\_

Email address associated with acct:

\_\_\_\_\_

User name: \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

Password: \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_

(5) Name of Company: \_\_\_\_\_

Type of service from this company: \_\_\_\_\_

Web address (url) \_\_\_\_\_

Email address associated with acct:

\_\_\_\_\_

User name: \_\_\_\_\_

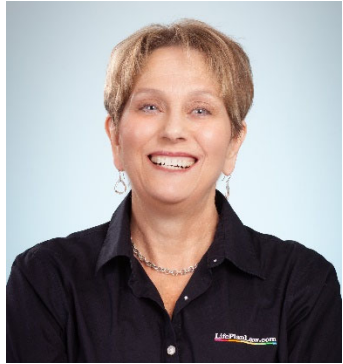
Changed on \_\_\_\_\_

To \_\_\_\_\_

Changed on \_\_\_\_\_

To \_\_\_\_\_





Catherine E. Blackburn graduated with High Distinction from the University of Kentucky College of Pharmacy in 1978 and practiced pharmacy before entering law school. She graduated with Honors from The Ohio State University College of

Law in 1982 and practiced in Columbus, Ohio before joining the faculty of the University of Louisville College of Law in 1987. In 1992 she moved to the Tampa Bay area and practiced catastrophic personal injury law until 2011. After decades of litigation practice, Ms. Blackburn turned her attention to legal life planning with a focus on ensuring that singles, couples, and persons with specific concerns, such as seniors needing long term and nursing home care and LGBTQ persons, receive legal advice and services directed to their needs and circumstances.

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