

HOW TO USE DIGITAL SAFE

- Before beginning, DECIDE HOW you want to save your information.
- You can PRINT the various forms you need to use, and enter the information by hand, OR you can save the downloaded forms on your electronic device and save it electronically.
- If you will be writing the information onto the form, print multiple blank copies before you begin.
- If you are storing it in digital format on your electronic device, create a file to hold the various forms you choose and give it a name you will remember. That way the different forms can be saved in the same place on your device.
- If you have accounts that have an online password, please confirm that the password you have is current, and DOES allow you to access the account online. Please write down the password so that you can enter it with the record of that online account or service. Also note the date and time that you confirmed that it works.
- A sample form, showing an example of how the necessary information is to be entered is provided, along with the blank version of that form that you will download to enter your personal data. Both versions are able to be downloaded.
- Review the sample form and make note of the kinds of information you will need to fill out the record of your assets.
- Gather information regarding your bank, insurance company, or investment names, account numbers, policy numbers, and passwords. It is common that you may need to revisit this step to make sure the list is complete.
- Make a list of all other property that you own. This includes real estate, automobiles, jewelry, or any item that you feel has significant value. There will be a form for this category.
- Review the types of categories for the form you feel you will need, or print all of them and decide which ones are needed later.
- Enter the information about each asset or account where appropriate.
- Once you have finished, please make at least two copies and put them in a safe place that you will not lose access to.