TERRAFIRMA
WEALTH PARTNERS



CLIENT GUIDE

Digital Asset & Password Locator

A SECURE RECORD OF YOUR ONLINE ACCOUNTS AND DIGITAL PROPERTY

Prepared for:

Date: _____ Last Updated: _____

A Note to You

In today's world, so much of our financial life exists behind screens and passwords. Bank accounts, retirement funds, insurance portals, cryptocurrency wallets, photo libraries, streaming services—these digital threads are woven into the fabric of daily life. But when something happens to you, can the people you love actually find and access what they need?

This document exists to answer that question with a confident "yes." It's a secure, organized record of your digital accounts, access credentials, and instructions for your executor or trusted family member.

We know this isn't the most exciting paperwork. But it's some of the most important. Take it one section at a time, and know that every line you fill in is one less burden on the people you care about.

Warmly,
TerraFirma Wealth Partners

Security & Storage Guidelines

> ⚠️ ***This document contains sensitive access information. Treat it with the same care you would a key to your home.***

1. Store the completed document in a fireproof safe, a secure safe deposit box, or with your estate attorney.
2. Never store this document digitally in an unencrypted location (e.g., desktop folder, email attachment, cloud drive without encryption).
3. Make sure your executor or successor trustee knows where to find this document and how to access it.
4. If you use a password manager, that single master password may be the most important entry on this entire form.
5. Review and update every 6–12 months as passwords, accounts, and subscriptions change.

1. Password Manager Access

If you use a password manager, this is the master key to everything else.

Password Manager	Master Password	Recovery Key / Backup Location	Email Linked

2. Email Accounts

Email is the gateway to resetting passwords for nearly everything. Start here.

Provider	Email Address	Password	2FA Method	Recovery Phone/Email	Legacy Contact?

3. Financial Account Logins

Online banking, brokerage, retirement accounts, credit cards. For account details, see Asset Inventory.

Institution	Website / App	Username	Password	2FA Device

4. Cryptocurrency

Critical: If private keys or seed phrases are lost, these assets are permanently unrecoverable.

Exchange Accounts

Exchange	Email / Username	Password	2FA Method	Approx. Value

Hardware / Cold Wallets

Wallet Type / Brand	Physical Location	Seed Phrase Location	PIN / Passphrase	Approx. Value

> ⚠️ ***Never store your seed phrase digitally in an unencrypted file. Write it on paper or stamp it on metal and store it in a separate secure location from the wallet device.***

5. Social Media Accounts

What should happen to each account? Options: memorialize, delete, or transfer.

Platform	Username / Handle	Password	Legacy Contact?	Desired Action

6. Subscriptions & Recurring Charges

These will keep billing after your death until someone cancels them.

Service	Monthly / Annual Cost	Payment Method (Card Last 4)	Auto-Renew Date	Login / How to Cancel

7. Cloud Storage & Digital Files

Where are your important documents, photos, and files stored digitally?

Service	Login / Email	Password	What's Stored	Shared With Anyone?

8. Other Digital Accounts

Shopping, loyalty programs, domains, websites, professional memberships, etc.

Account / Service	Username / Email	Password	Notes

9. Devices

Phones, tablets, laptops, desktops. Include unlock codes and any encryption passwords.

Device	Location	Unlock Code / Password	Encryption Password	Apple ID / Google Account

10. Important Notes

Any additional instructions, account details, or access information your executor should know.