

**Key Technology Information Form for \_\_\_\_\_ Updated: \_\_\_\_\_**

<b>Backup Lawyer</b>	_____	<b>Tel Day/Eve</b>	_____
<b>E-mail</b>	_____	<b>Cell</b>	_____
<b>Backup Person 2</b>	_____	<b>Tel Day/Eve</b>	_____
<b>E-mail</b>	_____	<b>Cell</b>	_____
<b>Family Contact</b>	_____	<b>Tel Day/Eve</b>	_____
<b>E-mail</b>	_____	<b>Cell</b>	_____
<b>Family Contact 2</b>	_____	<b>Tel Day/Eve</b>	_____
<b>E-mail</b>	_____	<b>Cell</b>	_____
<b>Tech Contact Person</b>	_____	<b>Tel Ofc/Cell</b>	_____
<b>Tech Company Name</b>	_____	<b>E-mail</b>	_____
<b>Software Consultant</b>	_____	<b>Tel Ofc/Cell</b>	_____
<b>Consultant Company</b>	_____	<b>E-mail</b>	_____

**Logins and Passwords**

Choose from these 3 options:

(1) If using **LastPass** or password software:

<b>Service/Program Name</b>	_____	<b>Login</b>	_____
		<b>Password</b>	_____

----- OR -----

(2) If using a paper or electronic password list:

<b>Password List Location</b>	_____	<b>Password</b>	_____
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----- AND/OR -----

(3) Enter your key logins and passwords here:

<b>Computer login</b>	_____	<b>Password</b>	_____
<b>Laptop login</b>	_____	<b>Password</b>	_____
<b>Server login</b>	_____	<b>Password</b>	_____
<b>E-mail Address 1</b>	_____	<b>Login/Pass.</b>	_____
<b>E-mail Address 2</b>	_____	<b>Login/Pass.</b>	_____
<b>E-mail Web address</b>	_____	<b>Login/Pass.</b>	_____
<b>E-mail POP3 server</b>	_____	<b>SMTP server</b>	_____
<b>Voicemail #/password</b>	_____	<b>Cell#/Pass.</b>	_____

**Software, Services and Social Media**

<b>Software or Service</b>	<b>Name or Web Address</b>	<b>Login or Username</b>	<b>Password</b>
<b>Case Management</b>	_____	_____	_____
<b>Billing / Accounting</b>	_____	_____	_____
<b>Website Admin</b>	_____	_____	_____
LinkedIn	_____	_____	_____
Facebook	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**Backup Systems**

<b>Backup Program</b>	_____	<b>Password</b>	_____
<b>Backup Drive Location</b>	_____	<b>Encrypt Pass.</b>	_____
<b>Recovery Media Loc.</b>	_____	<b>Support Tel</b>	_____
<b>Online Backup Service</b>	_____	<b>Website</b>	_____
<b>Online Backup Login</b>	_____	<b>Password</b>	_____
<b>Tech Support Phone</b>	_____	<b>Encrypt Pass.</b>	_____

**Key Technology Information Form - Page 2**

**Client List and Matter List (Electronic and/or Paper)**

**Client List Location**  
How to get active list: \_\_\_\_\_  
**Matter List Location**  
How to get active list: \_\_\_\_\_  
**Notes:** \_\_\_\_\_  
\_\_\_\_\_

**Client File Locations (Electronic and Paper)**

**Notes:** \_\_\_\_\_  
\_\_\_\_\_

**Financial Information**

<b>Bank 1 Name</b>	_____	<b>Webpage</b>	_____
<b>Bank 1 Login</b>	_____	<b>Password</b>	_____
<b>Checking Acct No.</b>	_____	<b>Saving/Trust</b>	_____
<b>Bank 2 Name</b>	_____	<b>Webpage</b>	_____
<b>Bank 2 Login</b>	_____	<b>Password</b>	_____
<b>Checking Acct No.</b>	_____	<b>Saving/Trust</b>	_____
<b>Credit Card 1 Name</b>	_____	<b>Webpage</b>	_____
<b>Credit Card 1 Login</b>	_____	<b>Password</b>	_____
<b>Credit Card 1 No.</b>	_____	<b>Security Q?</b>	_____
<b>Credit Card 2 Name</b>	_____	<b>Webpage</b>	_____
<b>Credit Card 2 Login</b>	_____	<b>Password</b>	_____
<b>Credit Card 2 No.</b>	_____	<b>Security Q?</b>	_____
<b>Accountant Name</b>	_____	<b>Phone</b>	_____
<b>Accountant Firm</b>	_____	<b>E-mail</b>	_____

**Important Records Locations (Electronic and Paper)**

Will, Health Care Directive, Power of Attorney, Banking, Insurance, IRA, Investment...

**Types of Records**  
**Locations:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Additional Important Information**

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

