



Your Legacy Organizing Company

Planning Ahead with Confidence and Compassion

MY PERSONAL INFORMATION

- | | |
|--|---|
| <input type="checkbox"/> Full Name | <input type="checkbox"/> Pet Name(s) |
| <input type="checkbox"/> Home Address | <input type="checkbox"/> Primary Care Provider(s) |
| <input type="checkbox"/> Phone Number(s) | <input type="checkbox"/> Social Security Number |
| <input type="checkbox"/> Birthdate/Place | <input type="checkbox"/> Education (<i>School, College, University</i>) |
| <input type="checkbox"/> Parents Full Names (<i>Maiden Names</i>) | <input type="checkbox"/> Charitable, Religious, Fraternal Orgs/Boards |
| <input type="checkbox"/> Siblings Full Names (<i>Maiden Names</i>) | <input type="checkbox"/> Special Needs Instructions or Care Routines |
| <input type="checkbox"/> Spouse Full Name | |

ADVANCE CARE PLANNING DOCUMENTS

- | | |
|--|--|
| <input type="checkbox"/> Advance Directive | <input type="checkbox"/> Healthcare Proxy |
| <input type="checkbox"/> Do Not Resuscitate | <input type="checkbox"/> MOLST/POLST/POST |
| <input type="checkbox"/> Executor/Estate Planner | <input type="checkbox"/> Organ/Body Donation |
| <input type="checkbox"/> Funeral Arrangements | <input type="checkbox"/> Paperwork |
| | <input type="checkbox"/> Power of Attorney |

IMPORTANT CONTACT INFORMATION

- | | |
|---|--|
| <input type="checkbox"/> Accountant | <input type="checkbox"/> Healthcare Proxy |
| <input type="checkbox"/> Attorney | <input type="checkbox"/> Insurance Agent |
| <input type="checkbox"/> Banker | <input type="checkbox"/> Pension/Retirement Fund |
| <input type="checkbox"/> Clergy | <input type="checkbox"/> Contact |
| <input type="checkbox"/> Employer | <input type="checkbox"/> People Who Should be Notified |
| <input type="checkbox"/> Executor of Estate | <input type="checkbox"/> Power of Attorney |
| <input type="checkbox"/> Financial Planner | <input type="checkbox"/> Stockbroker |
| <input type="checkbox"/> Funeral Home | <input type="checkbox"/> Tax Preparer |

LEGAL DOCUMENTS

- ☐ Appointment of Agent to Control Disposition of Remains
- ☐ Certified Death Certificate (*Vital Statistic*)
- ☐ Estate Plan
- ☐ Legal Will (*Vital Statistic*)
- ☐ Living Trust
- ☐ Power of Attorney

OTHER DOCUMENTS

- | | |
|--|--|
| <input type="checkbox"/> Armed Forces ID/Discharge Papers | <input type="checkbox"/> Marriage License (<i>Vital Statistic</i>) |
| <input type="checkbox"/> Birth Certificate (<i>Vital Statistic</i>) | <input type="checkbox"/> Naturalization/Immigration |
| <input type="checkbox"/> Deeds to Cemetery Plot | <input type="checkbox"/> Records/Certificate of Citizenship |
| <input type="checkbox"/> Deeds to Property | <input type="checkbox"/> Passport |
| <input type="checkbox"/> Deeds to Vehicle(s) | <input type="checkbox"/> Personal Files |
| <input type="checkbox"/> Divorce Certificate (<i>Vital Statistic</i>) | <input type="checkbox"/> Social Security Card (<i>Vital Statistic</i>) |
| <input type="checkbox"/> Driver's License/ID Card (<i>Vital Statistic</i>) | <input type="checkbox"/> Tax Returns |
| <input type="checkbox"/> Health Insurance Cards | |

FINANCIAL INFORMATION

- ☐ Automatic Withdrawals/Payments
- ☐ Bank Account(s)
- ☐ Cryptocurrency
- ☐ Donations (*Recurring and Automated*)
- ☐ Expenses or Money I Owe
- ☐ Garbage/Lawn care
- ☐ Mortgage/Rent
- ☐ Property Tax
- ☐ Utilities

INSURANCE POLICIES

- ☐ Auto/Vehicle
- ☐ Health/Dental/Vision (*Including Medicare*)
- ☐ Homeowner's/Renter's
- ☐ Life
- ☐ Long-term Care

INVESTMENTS & LOANS

- | | |
|---|--|
| <input type="checkbox"/> Investment Account(s) | <input type="checkbox"/> Other Loans (<i>Personal, Private, Other Secured Loans</i>) |
| <input type="checkbox"/> Loans in My Name | <input type="checkbox"/> Property Loans |
| <input type="checkbox"/> Credit Cards | <input type="checkbox"/> Student Loans |
| <input type="checkbox"/> Home Equity/Reverse Mortgage Loans | <input type="checkbox"/> Vehicles |
| <input type="checkbox"/> Loans I Have Co-Signed For | |

ADDITIONAL FINANCIAL INFO SUBSCRIPTIONS

- | | |
|---|---|
| <input type="checkbox"/> Memberships (<i>Gyms, Clubs, Associations, etc.</i>) | <input type="checkbox"/> Online Services and Goods |
| <input type="checkbox"/> Money or Assets Owed to Me | <input type="checkbox"/> Print Subscriptions (<i>Newspapers and Magazines</i>) |
| <input type="checkbox"/> Personal Property | <input type="checkbox"/> Vehicles |
| <input type="checkbox"/> Real Estate (Property) | <input type="checkbox"/> Streaming Devices (<i>Amazon, HBO, Hulu, Disney+, Netflix, etc.</i>) |
| <input type="checkbox"/> Retirement Account(s) | |
| <input type="checkbox"/> (<i>Pension, 401k, etc.</i>) | |
| <input type="checkbox"/> Stocks and Bonds | |

ELECTRONICS AND ONLINE ACCOUNTS

- ☐ Online Account Access
- ☐ Setup Apple Legacy
- ☐ Cloud Storage (*iCloud, Dropbox, Flickr, Google Drive, etc.*)
- ☐ Delivery Services (*Food, Medication, etc.*)
- ☐ Email Address(es)
- ☐ Entertainment (*Streaming Channels, Music, Gaming, etc.*)
- ☐ Healthcare (*Electronic Medical Record*)
- ☐ Shopping
- ☐ Software Licenses
- ☐ Travel
- ☐ Web Hosting

SOCIAL MEDIA AND DIGITAL LEGACY

- ☐ Account Closing
- ☐ Health Updates
- ☐ Death Announcement Preferences
- ☐ Person to Act on My Behalf
- ☐ Usernames and Passwords for Each Platform (*Facebook, Instagram, TikTok, X, etc.*)

UNLOCKING ELECTRONICS/SECURITY

- ☐ Apple ID
- ☐ Cellphone
- ☐ Desktop Computer
- ☐ Home Security System
- ☐ Internet and Wi-Fi Routers
- ☐ Laptop
- ☐ Tablet

FUNERAL AND BURIAL PLANS

- ☐ Burial/Cremation Plans
- ☐ Funeral Arrangements
- ☐ Heirlooms/Documents of Family History
- ☐ Obituary Information
- ☐ Personal Possessions I'd Like to Share

EMOTIONAL AND LEGACY ITEMS

- ☐ Letters or Videos to Loved Ones (*Partner, Child(ren), Friends*)
- ☐ Life Story Summary or Personal History
- ☐ List of Important Family Traditions or Recipes
- ☐ Instructions for Distributing Sentimental Items
- ☐ Memory Box or Legacy Journal Location

AFTER DEATH CHECKLIST

- | | |
|--|--|
| <input type="checkbox"/> Arrange for Care of Family and/or Pets | <input type="checkbox"/> Birth Certificate |
| <input type="checkbox"/> Collect Documents and Paperwork | <input type="checkbox"/> Certified Death Certificate |
| <input type="checkbox"/> Forward Mail | <input type="checkbox"/> Divorce Certificate |
| <input type="checkbox"/> Notify Upon Death List | <input type="checkbox"/> Driver's License or ID Card |
| <input type="checkbox"/> Obtain multiple copies of the Death Certificate | <input type="checkbox"/> Legal Will |
| <input type="checkbox"/> Secure Property | <input type="checkbox"/> Marriage License |
| <input type="checkbox"/> Secure Vital Statistics (<i>Required Documents</i>) | <input type="checkbox"/> Social Security Card |
| | <input type="checkbox"/> Update/Close Accounts |

SAFE STORAGE INFORMATION

- ☐ Location of Fireproof Safe/Lockbox
- ☐ Location of Backup Hard Drives or
- ☐ Location of Physical File Folders (*Labelled, Categorized*)
- ☐ USB Drives
- ☐ List of Who Has Keys, Combinations, or Digital Access

DIGITAL INSTRUCTIONS BEYOND ACCESS

- ☐ Message to Be Posted on Social Media (*If Desired*)
- ☐ Closure Instructions for Each Platform (*Memorialize vs. Delete*)
- ☐ Email Autoresponder Guidance (*Optional but Thoughtful*)

AFTER-DEATH SUPPORT FOR FAMILY

- ☐ Counseling Or Grief Support Resources
- ☐ List Of Family Traditions To Continue
- ☐ Notes On How To Manage Social, Financial, Or Household Transitions
- ☐ Instructions For Handling My Belongings Respectfully
- ☐ Charities Which My Personal Possessions Can Be Donated To
- ☐ Create A Heartfelt Video Message For Loved Ones To View After Your Passing