

If something happens to me, **start here**. This is the short list of who to call, how to get in, and what needs attention first. The full **Life & Legacy Organizer** has account numbers, beneficiaries, and everything else.

THIS BELONGS TO

THE FULL ORGANIZER IS KEPT

DATE COMPLETED

CALL FIRST

they can help with the rest

ROLE	NAME	PHONE
Financial advisor		
Estate attorney		
Executor / power of attorney		
CPA / tax preparer		
Insurance agent		

THE KEYS

how to get in

PHONE UNLOCK PIN

COMPUTER / LAPTOP LOGIN

PRIMARY EMAIL + WHERE ITS PASSWORD IS

PASSWORD MANAGER + WHERE MASTER KEY IS

HOME WI-FI NETWORK + PASSWORD

MONEY AT A GLANCE

details in full organizer

BANK(S)

INVESTMENTS / RETIREMENT (IRA, 401K, BROKERAGE)

LIFE INSURANCE COMPANY + POLICY #

PENSION / ANNUITY / SOCIAL SECURITY

OTHER (CRYPTO, BUSINESS, REAL ESTATE)

BILLS & AUTO-PAY

so nothing lapses

MORTGAGE / RENT (AUTO-PAY? DRAWS FROM?)

UTILITIES (ELECTRIC, GAS, WATER)

PROPERTY TAX + HOME / AUTO INSURANCE

OTHER KEY BILLS / SUBSCRIPTIONS TO CANCEL

FIRST STEPS

- ☐ Ask the funeral home to order **10 to 12 certified death certificates** (originals, not copies).
- ☐ Notify **Social Security** (1-800-772-1213). There may be a survivor benefit.
- ☐ **Do not close accounts** before checking what is on auto-pay.
- ☐ My funeral wishes are written down here: _____

WHERE THINGS ARE

WILL / TRUST

SAFE + WHERE THE COMBINATION IS

DEEDS, TITLES, KEY DOCUMENTS