



Below is a list of account, contact, and general information that should be completed for surviving family and friends that will help settle the estate:

Computer login

Phone login

iPad login

Social Security

Date and Place of Birth

Garage Alarm Code

Home Alarm Code

Financial Advisor(s) contact information

List of Investment Accounts

Attorney contact information

CPA contact information

P & C Insurance Agent contact information

Location of important documents and insurance policies:

Social Security Card - Birth Certificate - Passport

Family Photos

Annuity Policies

Divorce Documents

Estate Planning Documents

Funeral Pre-Payments + personal desires for funeral/celebration of life and music

Life Insurance Policies

Long Term Care Policies

House Title

Retirement/Pension documents

Past Homes Selling and cost basis documents

Boat or other vehicle Information/file

Bills on Autopay (bills and from which account/credit card)

Auto deposits (deposits and to which account deposited)

List of credit cards

Cell phone company

Legacy Contact set up in iPhone

Home Security company and contact information

TV and Internet companies contact information

Email accounts – email addresses and passwords

Personal websites and social media accounts

Set up memorialization settings – choose legacy contact

Passwords for ALL online accounts

Online shopping accounts

Delete auto delivery subscriptions (Amazon)

Medical equipment currently being rented should be returned

Automobiles – lease companies – Sirius XM – OnStar contact information

Housecleaning and Landscaping services contact information

Notify credit bureaus (TransUnion, Experion, Equifax) of death and request credit reports

May need to close open accounts shown in credit reports

Legacy Planning/“Swedish Death Cleaning” – the process of getting rid of physical items that you no longer need.

Inventory those items that you wish to pass along to family and/or friends. Include a story in written or verbal form of any special items.