



End-of-Life-Planning Guide

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. **Keep in a secure location and share with a trusted person.**

Funeral prepayments and personal desires for funeral/celebration of life and music

Computer, iPad/Tablet, and phone logins

Full Legal Name

Social Security

Date and Place of Birth

Garage and Home Alarm codes

Financial Advisor(s) and Bank(s) and contact information

List of Investment and Bank accounts

Attorney and tax professional and contact information

P & C Insurance Agent(s) and contact information

Auto, homeowners/renters, umbrella, flood insurances

Location of Important documents and insurance policies:

Social Security Card – Birth Certificate – Passport – Drivers License – Insurance cards

Business Ownership documents

Family Photos

Annuity policies

Divorce documents

Estate Planning documents

Life Insurance policies

Long Term Care policies

House Title

Retirement/Pension documents

Cost Basis information for home(s) and records from previous house sales

Boat and or other vehicle information/file

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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 – set up in Legacy Contact(s) in iPhone

Home Security company and contact information

TV, Internet, and streaming companies and contact information

Utility companies and contact information

Email accounts – email addresses and passwords

Subscriptions – magazines, newspapers, online (apps, cloud storage)

Online shopping accounts – include auto delivery subscriptions (Amazon)

Personal websites and social media accounts

Set up memorialization settings – choose legacy contact

Passwords for ALL online accounts

List of medical equipment currently rented that should be returned upon passing

Automobiles – lease companies – Sirius XM – OnStar contact information

Housecleaning, landscaping, pool services and contact information

Personal messages and Legacy notes – letters to family and friends; instructions for family traditions, charities, or causes

Make an inventory and include a story of those items that you wish to pass along to family and/or friends.

Note to trusted contact: Notify credit bureaus (TransUnion, Experion, Equifax) of death and request credit reports. May need to close open accounts show in credit reports.