SWFL Silver Solutions

# 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

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.