SWFL Silver Solutions

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
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(s)

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