

Antiscramble – Death Preparation Guide

antiscramble.com

How to Use This Document

This document was generated at antiscramble.com -- a tool to help you organize your important life information for the people you love.

DISCLAIMER: This document is not a legal instrument. It does not replace a will, trust, power of attorney, or any other legal document. It is a personal organizational guide only. Consult a qualified attorney for legal estate planning.

Every field in this PDF is fillable. Click on any field and start typing.

Here's what you can do with it:

1. Fill it in -- Work through each section at your own pace.
You don't have to complete everything at once.
2. Save it -- Save this PDF to keep your progress at any time.
Your data stays in this file on your device.
3. Print it -- Print a hard copy to store in a safe, filing cabinet, or with your estate documents.
4. Share it -- Give copies to your spouse, executor, attorney, or anyone who would need this information.
5. Update it -- Life changes. Revisit this document periodically to keep it current. Download a fresh copy at antiscramble.com.

Tips:

- You don't need to fill in every section, only what applies to you.
- Each section has multiple blank slots. Skip any you don't need.
- Store this document somewhere secure. It may contain sensitive information like account numbers and passwords.
- Let at least one trusted person know where to find this document.

Your data never leaves your device. Nothing is stored on our servers. 100% private.

IMPORTANT DISCLAIMER

This document is an organizational tool only. It does not constitute legal, financial, tax, or investment advice. The checklists and informational content are provided for general awareness and should not be relied upon as professional guidance. Consult with qualified attorneys, financial advisors, and tax professionals for advice specific to your situation. Laws vary by state and jurisdiction.

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Before You Die: Planning Checklist

Consider these items as you organize your affairs. Every situation is different.

Legal Considerations (discuss with your attorney)

- Consider creating or updating your Will
- Ask your attorney whether a Living Trust makes sense for your situation
- Consider executing a Durable Financial Power of Attorney
- Consider completing a Healthcare Power of Attorney / Healthcare Proxy
- Consider completing a Living Will / Advance Directive
- Ask your doctor about a POLST/MOLST form if applicable
- Consider designating legal guardians for minor children
- Consider reviewing beneficiary designations on accounts with your attorney
- Consider creating a Letter of Instruction for your executor
- Consider discussing plans with your executor so they know what to expect
- Consider storing originals in a secure location and providing copies to your attorney

Financial Considerations (discuss with your advisor)

- Consider whether consolidating bank accounts would simplify things
- Ask your attorney about TOD/POD designations on accounts
- Consider reviewing life insurance policies and beneficiaries
- Consider reviewing retirement account beneficiaries (401k, IRA, pension)
- Consider documenting debts and noting terms regarding forgiveness on death
- Consider discussing funeral funding options with your financial advisor
- Consider organizing tax returns (current and prior 2 years)

Medical & Healthcare Considerations

- Consider completing an Advance Directive / Living Will
- Consider discussing end-of-life wishes with your healthcare agent
- Consider documenting organ and tissue donation preferences
- Consider creating a comprehensive medication list
- Consider documenting healthcare providers and their contact info
- Consider whether a psychiatric advance directive applies to you
- Consider discussing resuscitation preferences with your doctor

Property & Possessions Considerations

- Consider locating and organizing deeds, titles, and registrations
- Consider documenting property ownership types (joint, sole, trust-held)
- Consider decluttering -- executors often report cleanup takes 1+ years
- Consider creating an inventory of valuable items with appraisals
- Consider documenting vehicle title transfer instructions
- Consider planning for pet care (caretaker, funding)

- Consider documenting storage unit contents and access info
- Consider organizing physical keys and access codes in one place

Digital Life Considerations

- Consider setting up a password manager and sharing master access with someone trusted
- Consider documenting 2FA backup codes and recovery methods
- Consider setting legacy contacts on Apple, Google, Facebook
- Consider creating a digital asset inventory
- If you hold cryptocurrency, consider documenting recovery procedures and having someone you trust verify the process
- Consider backing up important photos and files and documenting where they are

Insurance Considerations (discuss with your agent or advisor)

- Consider reviewing life insurance coverage and beneficiaries
- Consider understanding the impact on spouse/dependents' health insurance
- Consider whether long-term care insurance is appropriate
- Consider reviewing homeowners/renters, auto, and umbrella policy status

Communication Considerations

- Consider telling someone where this document is stored
- Consider having a conversation with your spouse/partner about finances
- Consider discussing your wishes with adult children
- Consider introducing your executor to your attorney and financial advisor
- Consider letting at least 2 people know how to access your password manager

Topics to Discuss With Your Attorney

- Account titling and beneficiary designations
- Timing of bank account access after death
- Insurance coverage on property and valuables
- Decluttering plans -- executors often report cleanup can take 1+ years
- How your family will find important documents
- How ongoing bills will be handled (mortgage, utilities, subscriptions)
- How immediate expenses will be covered after death
- Having these conversations sooner rather than later

After a Death Occurs

A general timeline of things to consider. Consult an attorney for guidance specific to your situation.

Immediately (Day 1)

- A legal pronouncement of death may be needed
- Consider contacting close family and friends
- Consider arranging care for dependents and pets
- Consider securing the home and valuables
- Look for any funeral/burial instructions or prepaid plans
- Check for organ/tissue donation wishes

First Week

- Consider making funeral, burial, or cremation arrangements
- You may need multiple certified death certificates (often 10-15)
- Consider notifying the employer and asking about death benefits
- Consider forwarding mail to the executor or a family member
- Consider securing the property (lock home, protect valuables)

First Month

- Consider locating the Will and identifying the executor
- The Will may need to be filed with probate court (consult attorney for your state's deadline)
- Consider meeting with a trusts and estates attorney
- Consider contacting a CPA about tax obligations
- Consider making an inventory of all assets
- The Social Security Administration may need to be notified (800-772-1213)
- Consider filing life insurance claims (the NAIC Policy Locator may help find missing policies: eapps.naic.org/life-policy-locator/)
- Consider notifying banks and financial institutions
- Consider contacting credit bureaus (Equifax, Experian, TransUnion) to help prevent identity theft
- Consider canceling the driver's license at the DMV
- If the deceased was a veteran, consider contacting the VA (800-827-1000)
- Consider reviewing subscriptions and services that may no longer be needed

First 3 Months

- Consider closing or updating credit card accounts
- Consider terminating or transferring insurance policies and requesting unused premium refunds
- Vehicle titles may need to be transferred
- Consider handling utility accounts (transfer or cancel)
- Consider deleting or memorializing social media accounts
- Consider closing email accounts (after checking for important correspondence)
- Voter registration records may need to be updated

- Consider handling frequent flyer/loyalty points transfers
- Consider canceling memberships and recurring donations (or continuing per wishes)
- If applicable, DSHS/Medicaid may need to be notified (for estate recovery)

First Year

- A final tax return may need to be filed for the deceased
- An estate tax return may need to be filed if applicable
- The probate process may need to be completed
- Assets may need to be distributed per the Will/Trust
- Close estate bank accounts
- File any remaining insurance claims

IMPORTANT: Cryptocurrency Warning

Cryptocurrency cannot be recovered without private keys -- there is no bank, no customer service, and no password reset. If keys or seed phrases are lost, the assets are gone permanently.

Verification Steps (do these NOW, while the owner is alive):

1. Confirm you have access to all wallets and exchanges listed in this document.
2. Test the recovery process using seed phrases on a separate device.
3. Verify 2FA backup codes are current and accessible.
4. Ensure the executor understands the difference between hot and cold wallets.
5. Document the exact steps to access each wallet (not just the seed phrase).

Common Mistakes:

- Storing seed phrases only digitally (can be lost if device fails)
- Single point of failure (only one copy of recovery info)
- Not testing the recovery process before it is needed
- Assuming the exchange will help -- they often won't without the account holder
- Forgetting about staking, DeFi positions, or NFTs on other chains

NAIC Life Insurance Policy Locator

The National Association of Insurance Commissioners (NAIC) offers a tool to search for lost or unclaimed life insurance policies, annuities, and other insurance products.

URL: eapps.naic.org/life-policy-locator/

How it works:

1. Submit the deceased person's information online.
2. NAIC searches all participating insurance companies.
3. Results are sent to the requester within 90 days.

This service is completely free and can uncover policies the family may not have known existed.

Digital Legacy Tips

Beyond the form fields in this document, there are many things you can set up now to make things easier for your loved ones later. Most major platforms have legacy features -- they're just not well advertised.

Apple / iPhone

Legacy Contact

Apple's Legacy Contact feature lets you designate someone who can access your Apple ID data after you pass away. They'll be able to access your photos, messages, notes, files, and more.

How to set it up:

1. Go to Settings > [Your Name] > Sign-In & Security
2. Tap Legacy Contact
3. Tap Add Legacy Contact
4. Choose someone and share your access key with them

Your Legacy Contact will receive an access key. Combined with a death certificate, they can request access to your account from Apple.

Device Passcode

Consider writing down your iPhone/iPad passcode and storing it securely (perhaps noted in this document). Without it, your family may need to go through Apple's formal process even with Legacy Contact access.

Google

Inactive Account Manager

Google's Inactive Account Manager lets you decide what happens to your Google data (Gmail, Drive, Photos, YouTube, etc.) if your account becomes inactive.

How to set it up:

1. Go to myaccount.google.com/inactive
2. Set how long to wait before considering your account inactive (3-18 months)
3. Add trusted contacts who will be notified
4. Choose which data to share with each contact
5. Optionally set the account to auto-delete

Google will attempt to contact you before triggering any actions, so there's no risk of accidental activation.

Facebook & Instagram

Facebook Legacy Contact

Facebook allows you to choose a Legacy Contact -- someone who can manage your memorialized profile after you pass. They can write a pinned post, respond to friend requests, and update your profile picture.

How to set it up:

1. Go to Settings > Account Center > Personal Details
2. Tap Account Ownership and Control

3. Tap Memorialization Settings
4. Choose a Legacy Contact from your friends list

Request Account Deletion

Alternatively, you can request that Facebook delete your account after death rather than memorialize it. This option is in the same Memorialization Settings area.

Instagram

Instagram (owned by Meta) offers memorialization for accounts of deceased users. A "Remembering" label appears above the profile name. Family members can request memorialization or account removal by contacting Instagram directly with proof of death.

If you use Facebook, your Instagram Legacy Contact settings may be linked. Check both platforms to ensure your preferences are consistent.

X (Twitter) & LinkedIn

X (Twitter)

X doesn't have a legacy contact feature, but family members or estate executors can request account deactivation by submitting a request with proof of death. If you want to preserve your tweets, consider using Twitter's archive download feature (Settings > Your Account > Download an archive) and storing it somewhere your family can access.

LinkedIn

LinkedIn allows verified family members to memorialize or remove an account. Memorialized profiles show "Remembering [Name]" and are removed from suggestions and messages. Request this through LinkedIn's help center with documentation of your relationship and proof of death.

Password Managers

If you use a password manager, check if it has emergency access features:

- **1Password:** Family plans allow you to designate family organizers who can help recover accounts.
- **LastPass:** Emergency Access lets you designate trusted contacts who can request access after a waiting period.
- **Bitwarden:** Emergency Access with configurable wait times (available on Premium plans).
- **Dashlane:** Emergency contact feature with time-delayed access.

Your password manager master password is the key to your digital life. Consider writing it down and storing it securely -- perhaps with your will or in a safe deposit box.

Financial Accounts

Beneficiary Designations

Many financial accounts allow you to designate beneficiaries. Discuss the following with your attorney or financial advisor:

- **Bank accounts:** POD (Payable on Death) beneficiary designations
- **Investment accounts:** TOD (Transfer on Death) beneficiary designations
- **Retirement accounts:** Beneficiary designations on 401(k)s and IRAs
- **Life insurance:** Periodic review and update of beneficiaries

Joint Account Access

Whether to add a spouse or partner as a joint owner on accounts is a decision with legal and tax implications. Consult your attorney to understand the options available in your jurisdiction.

Digital Subscriptions

Make a list of your recurring subscriptions so your family can cancel them:

- **Streaming:** Netflix, Spotify, Hulu, Disney+, YouTube Premium
- **Cloud storage:** iCloud, Dropbox, Google One
- **Software:** Adobe, Microsoft 365, antivirus
- **Other:** Memberships, apps, domain registrations, web hosting

Many of these can be found by searching your email for "subscription" or "receipt" or checking your bank/credit card statements.

Email Access

Email is often the key to everything else -- password resets, account recovery, finding subscriptions, and contacting people. Consider:

- Using Google's Inactive Account Manager (see above)
 - Writing down your email password and storing it with your will
 - Setting up a trusted person as a recovery contact
 - Using a shared family password manager
-

Cryptocurrency & Digital Assets

Cryptocurrency requires special attention -- without your private keys or seed phrase, your assets are permanently inaccessible. Billions in crypto have been lost this way.

Self-Custody Wallets

- **Seed phrase:** Store your 12 or 24-word recovery phrase securely -- consider a fireproof safe, safe deposit box, or metal backup plate
- **Hardware wallets:** Note the PIN and location of your Ledger, Trezor, etc.
- **Never:** Store seed phrases digitally unless in an encrypted vault

Exchange Accounts

For crypto on exchanges (Coinbase, Kraken, etc.), ensure your family can access:

- Account login credentials
- 2FA backup codes
- Beneficiary designation (if the exchange offers it)

Cryptocurrency inheritance is governed by evolving laws that vary by jurisdiction. Consult an estate attorney familiar with digital assets for guidance specific to your situation.

Two-Factor Authentication (2FA)

2FA protects your accounts, but can lock out your family. Plan for this:

- **Backup codes:** Most services provide one-time backup codes. Save these with your passwords.
- **Authenticator apps:** you use Google Authenticator, Authy, or similar, note that Authy allows multi-device sync. Google Authenticator offers backup.

- **Hardware keys:** If you use YubiKeys, consider registering a backup key and storing it separately.
- **Phone-based 2FA:** If your family has access to your phone, SMS codes will still work. But note that some accounts may lock after inactivity.

Create a simple document listing which accounts use 2FA and where the backup codes are stored. This alone can save hours of frustration.

Microsoft

Microsoft accounts control Outlook/Hotmail email, OneDrive, Xbox, and Windows licenses.

Next of Kin Process

Microsoft allows next of kin to request content from a deceased person's account. You'll need to provide documentation including a death certificate and proof of relationship. Visit Microsoft's Next of Kin support page.

Unlike Google, Microsoft doesn't have a pre-configured inactive account manager. Document your account credentials separately.

Amazon

Amazon accounts often contain years of purchase history, Kindle libraries, and Prime benefits.

- **Kindle content:** Unfortunately, Kindle books are licensed, not owned. They cannot be transferred. Consider downloading DRM-free versions where available.
- **Amazon Photos:** If you use Amazon Photos, ensure someone can access the account to download family pictures.
- **Active subscriptions:** Prime, Subscribe & Save, Audible -- note these so they can be cancelled.

Amazon's policy allows account closure upon request from estate executors with proper documentation.

Smart Home Devices

Smart home devices can become inaccessible without the controlling account:

- **Smart locks:** Document master codes and how to reset them. Your family may need physical access to the house.
- **Security cameras:** Ring, Nest, etc. -- note the account credentials and how to transfer ownership.
- **Thermostats, lights, speakers:** Usually tied to Google, Amazon, or Apple accounts. Make sure someone has access to the controlling account.
- **Garage door openers:** Smart garage systems may need account access to reprogram.

If you use Apple HomeKit, adding a family member to your Home gives them control of all connected devices -- a simple way to ensure continuity.

Gaming Accounts

Digital game libraries can be worth thousands of dollars but are notoriously non-transferable:

- **Steam:** No official transfer policy. Sharing credentials is against ToS but is the only practical option for family access.
- **PlayStation:** Sony allows account closure but not transfer. Consider game sharing with family while alive.
- **Xbox:** Microsoft's next-of-kin process may help, but digital licenses are typically non-transferable.
- **Nintendo:** Account closure only; no transfer options.

Document login credentials in this form. While technically against most ToS, it's often the only way to preserve access to digital game libraries.

Messaging Apps

Chat histories often contain important information and memories:

- **WhatsApp:** End-to-end encrypted. Enable chat backup to Google Drive or iCloud. Consider exporting important chats.
 - **Signal:** Designed for privacy -- no cloud backup by default. Messages are only on your device.
 - **Telegram:** Cloud-based (except Secret Chats). Account can be set to self-destruct after inactivity.
 - **iMessage:** Included in Apple's Legacy Contact program. Messages sync across devices if enabled.
-

Medical Records & Healthcare Portals

Access to medical information can be crucial for surviving family members:

- **Patient portals:** MyChart, patient.info, etc. -- note login credentials and which healthcare providers use which systems.
- **Insurance portals:** Health, dental, vision -- document how to access policy information and claims history.
- **Medicare/Medicaid:** Medicare.gov accounts contain important coverage information.
- **Health apps:** Apple Health, Fitbit, etc. may contain useful medical history.

HIPAA allows authorized representatives (usually the executor or next of kin) to access medical records of deceased individuals. Having login credentials makes this process much faster.

Domains & Websites

If you own domain names or websites, they need ongoing maintenance:

- **Domain registrars:** oDaddy, Namecheap, Cloudflare, Google Domains -- note where each domain is registered and login credentials.
- **Renewal dates:** Domains expire. Missing a renewal can mean losing your domain permanently.
- **Hosting providers:** Where are your websites actually hosted? How is the server accessed?
- **Email hosting:** If your domain has email (you@yourdomain.com), document how it's set up.

If you have a personal blog or family website, consider whether someone should maintain it or if you want it archived (archive.org) or taken down.

Photo Libraries

Photos are often the most emotionally valuable digital assets:

- **Google Photos:** Use Inactive Account Manager to share with a trusted contact. Consider using Google Takeout to download periodically.
- **iCloud Photos:** Covered by Apple's Legacy Contact. Make sure it's enabled.
- **Amazon Photos:** Document account access; no legacy features.
- **Local backups:** If you have photos on external drives, note their locations and any encryption passwords.

Consider setting up a shared family album (Google Photos shared album, iCloud Shared Library) so your best photos are already accessible to loved ones.

Connected Vehicles

Modern vehicles are increasingly connected and may require account access:

- **Tesla:** Tesla accounts control vehicle access, charging, and features. Transfer requires Tesla support and proof of ownership.
- **Other EVs:** Rivian, Ford, GM, etc. -- document app accounts and how to transfer vehicle ownership.
- **Connected car apps:** MyChevrolet, FordPass, Toyota app -- note how to access and transfer.
- **EV charging accounts:** ChargePoint, Electrify America, etc.

For traditional vehicles, remember to document where titles and registration documents are kept.

Work & Business Accounts

If you're self-employed or own a business:

- **Business bank accounts:** Document which have authorized signers and how to add new ones.
 - **Payment processors:** Stripe, Square, PayPal Business -- document admin access.
 - **Accounting software:** QuickBooks, FreshBooks, Wave -- note who has access.
 - **Professional licenses:** Note any licenses or certifications that might affect business continuity.
 - **Client relationships:** Consider how clients should be notified and who should handle ongoing commitments.
-

Don't Forget the Physical World

While you're thinking about digital legacy, don't forget:

- **Safe deposit box:** Make sure someone knows it exists and can access it
- **Home safe:** Share the combination or location of the key
- **Important documents:** Will, trust, insurance policies, deeds, titles
- **Keys:** House, car, storage unit, office
- **Contact list:** Attorney, accountant, financial advisor, doctor

Instructions Upon My Death

General Message to Loved Ones

Step 1

Timeframe

Task

Details

Step 2

Timeframe

Task

Details

Step 3

Timeframe

Task

Details

Step 4

Timeframe

Task

Details

Step 5

Timeframe

Task

Details

Step 6

Timeframe

Task

Details

Step 7

Timeframe

Task

Details

Step 8

Timeframe

Task

Details

Step 9

Timeframe

Task

Details

Step 10

Timeframe

Task

Details

Personal & ID

Full Legal Name

Maiden Name

Preferred Name

Date of Birth

Place of Birth

Citizenship

SSN

ITIN

Tax ID

Driver's License #

State

Expires

Passport #

Country

Expires

Birth Certificate Location

Marriage Certificate Location

Will Location

Trust Documents Location

Power of Attorney Location

Divorce Decree Location

Former Spouse Name

Date of Divorce

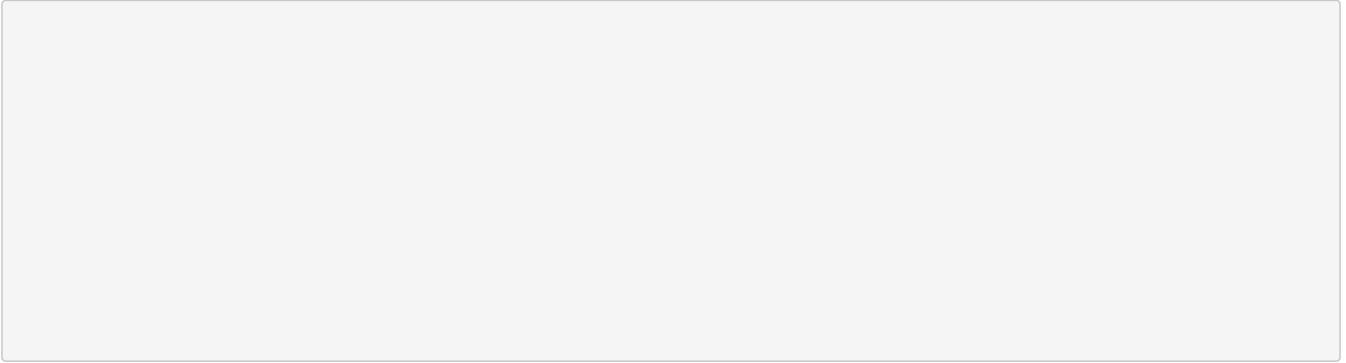
Court / Jurisdiction

Divorce Attorney Name

Divorce Attorney Phone

Divorce Notes

Notes



Personal & ID — Family Member 1

Full Legal Name

Relationship to You

Maiden / Former Name

Preferred Name

Date of Birth

Place of Birth

Citizenship

SSN

ITIN

Tax ID

Driver's License #

State

Expires

State ID #

State

Passport #

Country

Expires

Known Traveler #

Global Entry #

Birth Certificate Location

Marriage Certificate Location

Naturalization Certificate Location

Voter Registration

Selective Service #

Additional Notes

Personal & ID — Family Member 2

Full Legal Name

Relationship to You

Maiden / Former Name

Preferred Name

Date of Birth

Place of Birth

Citizenship

SSN

ITIN

Tax ID

Driver's License #

State

Expires

State ID #

State

Passport #

Country

Expires

Known Traveler #

Global Entry #

Birth Certificate Location

Marriage Certificate Location

Naturalization Certificate Location

Voter Registration

Selective Service #

Additional Notes

Personal & ID — Family Member 3

Full Legal Name

Relationship to You

Maiden / Former Name

Preferred Name

Date of Birth

Place of Birth

Citizenship

SSN

ITIN

Tax ID

Driver's License #

State

Expires

State ID #

State

Passport #

Country

Expires

Known Traveler #

Global Entry #

Birth Certificate Location

Marriage Certificate Location

Naturalization Certificate Location

Voter Registration

Selective Service #

Additional Notes

Personal & ID — Family Member 4

Full Legal Name

Relationship to You

Maiden / Former Name

Preferred Name

Date of Birth

Place of Birth

Citizenship

SSN

ITIN

Tax ID

Driver's License #

State

Expires

State ID #

State

Passport #

Country

Expires

Known Traveler #

Global Entry #

Birth Certificate Location

Marriage Certificate Location

Naturalization Certificate Location

Voter Registration

Selective Service #

Additional Notes

Personal & ID — Family Member 5

Full Legal Name

Relationship to You

Maiden / Former Name

Preferred Name

Date of Birth

Place of Birth

Citizenship

SSN

ITIN

Tax ID

Driver's License #

State

Expires

State ID #

State

Passport #

Country

Expires

Known Traveler #

Global Entry #

Birth Certificate Location

Marriage Certificate Location

Naturalization Certificate Location

Voter Registration

Selective Service #

Additional Notes

Personal & ID — Family Member 6

Full Legal Name

Relationship to You

Maiden / Former Name

Preferred Name

Date of Birth

Place of Birth

Citizenship

SSN

ITIN

Tax ID

Driver's License #

State

Expires

State ID #

State

Passport #

Country

Expires

Known Traveler #

Global Entry #

Birth Certificate Location

Marriage Certificate Location

Naturalization Certificate Location

Voter Registration

Selective Service #

Additional Notes

Previous Addresses

Address 1

Street

City

State

Zip

Dates Lived There

Address 2

Street

City

State

Zip

Dates Lived There

Address 3

Street

City

State

Zip

Dates Lived There

Address 4

Street

City

State

Zip

Dates Lived There

Address 5

Street

City

State

Zip

Dates Lived There

Address 6

Street

City

State

Zip

Dates Lived There

Address 7

Street

City

State

Zip

Dates Lived There

Address 8

Street

City

State

Zip

Dates Lived There

Address 9

Street

City

State

Zip

Dates Lived There

Address 10

Street

City

State

Zip

Dates Lived There

Emergency Contacts

Immediate Emergency Instructions

Key Medical Info for EMT

Neighbor Name

Neighbor Phone

Contact 1

Name

Relationship

Phone

Cell Phone

Email

Address

Notes

Contact 2

Name

Relationship

Phone

Cell Phone

Email

Address

Notes

Contact 3

Name

Relationship

Phone

Cell Phone

Email

Address

Notes

Contact 4

Name

Relationship

Phone

Cell Phone

Email

Address

Notes

Contact 5

Name

Relationship

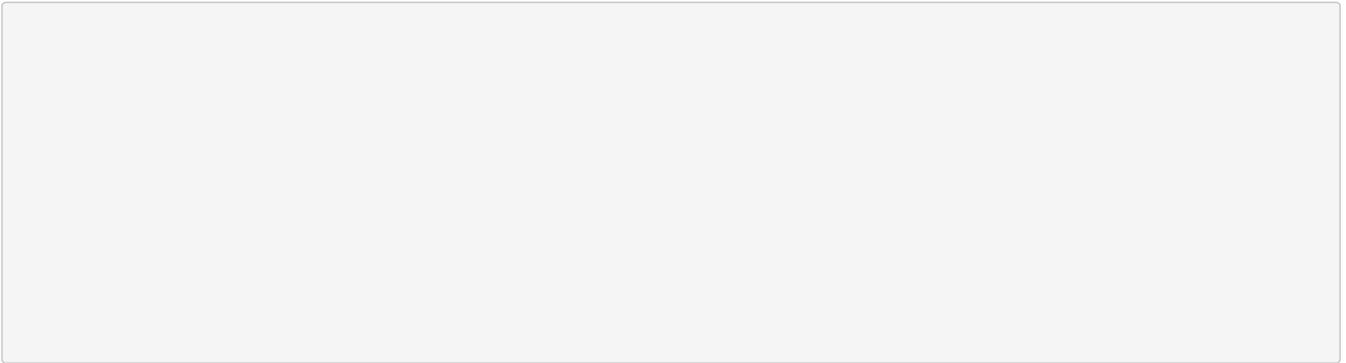
Phone

Cell Phone

Email

Address

Notes



People to Notify

Person 1

Name

Relationship

Preferred Contact Method

Phone

Email

Address

Notes

Person 2

Name

Relationship

Preferred Contact Method

Phone

Email

Address

Notes

Person 3

Name

Relationship

Preferred Contact Method

Phone

Email

Address

Notes

Person 4

Name

Relationship

Preferred Contact Method

Phone

Email

Address

Notes

Person 5

Name

Relationship

Preferred Contact Method

Phone

Email

Address

Notes

Person 6

Name

Relationship

Preferred Contact Method

Phone

Email

Address

Notes

Person 7

Name

Relationship

Preferred Contact Method

Phone

Email

Address

Notes

Person 8

Name	Relationship	Preferred Contact Method
<input type="text"/>	<input type="text"/>	<input type="text"/>

Phone	Email
<input type="text"/>	<input type="text"/>

Address

Notes

Person 9

Name	Relationship	Preferred Contact Method
<input type="text"/>	<input type="text"/>	<input type="text"/>

Phone	Email
<input type="text"/>	<input type="text"/>

Address

Notes

Person 10

Name

Relationship

Preferred Contact Method

Phone

Email

Address

Notes

Person 11

Name

Relationship

Preferred Contact Method

Phone

Email

Address

Notes

Person 12

Name

Relationship

Preferred Contact Method

Phone

Email

Address

Notes

Person 13

Name

Relationship

Preferred Contact Method

Phone

Email

Address

Notes

Person 14

Name

Relationship

Preferred Contact Method

Phone

Email

Address

Notes

Person 15

Name

Relationship

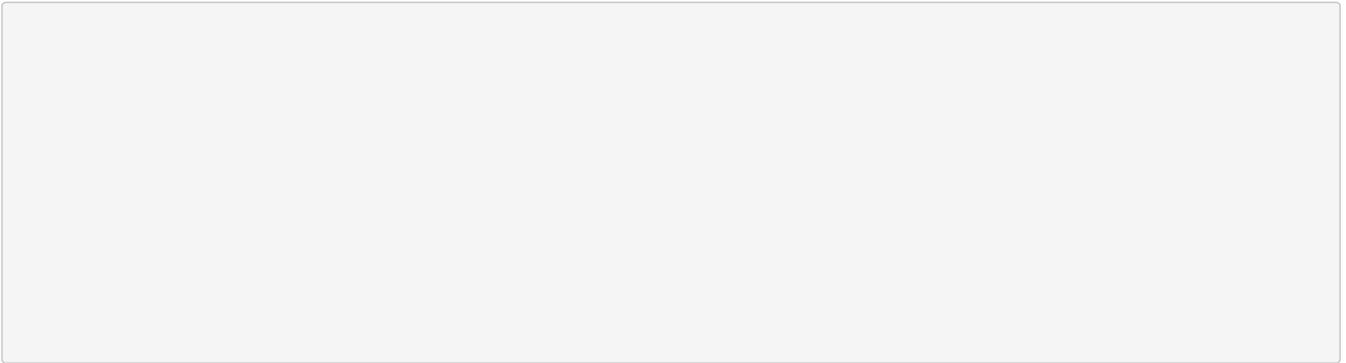
Preferred Contact Method

Phone

Email

Address

Notes



Professional Contacts

Professional 1

Type

Name

Firm

Phone

Email

Notes

Professional 2

Type

Name

Firm

Phone

Email

Notes

Professional 3

Type

Name

Firm

Phone

Email

Notes

Professional 4

Type

Name

Firm

Phone

Email

Notes

Professional 5

Type

Name

Firm

Phone

Email

Notes

Professional 6

Type

Name

Firm

Phone

Email

Notes

Professional 7

Type

Name

Firm

Phone

Email

Notes

Professional 8

Type

Name

Firm

Phone

Email

Notes

Professional 9

Type

Name

Firm

Phone

Email

Notes

Professional 10

Type

Name

Firm

Phone

Email

Notes

Children

Child 1

Name

Date of Birth

School

School Phone

Notes

Child 2

Name

Date of Birth

School

School Phone

Notes

Child 3

Name

Date of Birth

School

School Phone

Notes

Child 4

Name

Date of Birth

School

School Phone

Notes

Child 5

Name

Date of Birth

School

School Phone

Notes

Guardian Nominations

Nomination 1

Child Name

Primary Guardian

Guardian Phone

Alternate Guardian

Care Instructions

Nomination 2

Child Name

Primary Guardian

Guardian Phone

Alternate Guardian

Care Instructions

Nomination 3

Child Name

Primary Guardian

Guardian Phone

Alternate Guardian

Care Instructions

Nomination 4

Child Name

Primary Guardian

Guardian Phone

Alternate Guardian

Care Instructions

Nomination 5

Child Name

Primary Guardian

Guardian Phone

Alternate Guardian

Care Instructions

Adoption Information

Adoption 1

Child's Name Before

Name After

Birth Mother

Birth Father

Birth Institution

Adoption Agency

Original Birth Certificate Location

Adoption 2

Child's Name Before

Name After

Birth Mother

Birth Father

Birth Institution

Adoption Agency

Original Birth Certificate Location

Adoption 3

Child's Name Before

Name After

Birth Mother

Birth Father

Birth Institution

Adoption Agency

Original Birth Certificate Location

Health & Medical

Dietary Allergies

Medication Allergies

Environmental Allergies

Foods to Avoid

Dietary Restrictions

Healthcare Provider 1

Type

Name

Practice Name

Phone

Medical Record #

Notes

Healthcare Provider 2

Type

Name

Practice Name

Phone

Medical Record #

Notes

Healthcare Provider 3

Type

Name

Practice Name

Phone

Medical Record #

Notes

Healthcare Provider 4

Type

Name

Practice Name

Phone

Medical Record #

Notes

Healthcare Provider 5

Type

Name

Practice Name

Phone

Medical Record #

Notes

Healthcare Provider 6

Type

Name

Practice Name

Phone

Medical Record #

Notes

Healthcare Provider 7

Type

Name

Practice Name

Phone

Medical Record #

Notes

Healthcare Provider 8

Type

Name

Practice Name

Phone

Medical Record #

Notes

Healthcare Provider 9

Type

Name

Practice Name

Phone

Medical Record #

Notes

Healthcare Provider 10

Type

Name

Practice Name

Phone

Medical Record #

Notes

Family Medical History

Family Member 1

Family Member

Relationship

Condition

Details

Family Member 2

Family Member

Relationship

Condition

Details

Family Member 3

Family Member

Relationship

Condition

Details

Family Member 4

Family Member

Relationship

Condition

Details

Family Member 5

Family Member

Relationship

Condition

Details

Family Member 6

Family Member

Relationship

Condition

Details

Family Member 7

Family Member

Relationship

Condition

Details

Family Member 8

Family Member

Relationship

Condition

Details

Family Member 9

Family Member

Relationship

Condition

Details

Family Member 10

Family Member

Relationship

Condition

Details

Medications

Medication 1

Name	Dosage	Schedule
<input type="text"/>	<input type="text"/>	<input type="text"/>
Pharmacy	Prescribing Doctor	
<input type="text"/>	<input type="text"/>	
Purpose		
<input type="text"/>		

Medication 2

Name	Dosage	Schedule
<input type="text"/>	<input type="text"/>	<input type="text"/>
Pharmacy	Prescribing Doctor	
<input type="text"/>	<input type="text"/>	
Purpose		
<input type="text"/>		

Medication 3

Name	Dosage	Schedule
<input type="text"/>	<input type="text"/>	<input type="text"/>
Pharmacy	Prescribing Doctor	
<input type="text"/>	<input type="text"/>	
Purpose		
<input type="text"/>		

Medication 4

Name	Dosage	Schedule
<input type="text"/>	<input type="text"/>	<input type="text"/>
Pharmacy	Prescribing Doctor	
<input type="text"/>	<input type="text"/>	
Purpose		
<input type="text"/>		

Medication 5

Name	Dosage	Schedule
<input type="text"/>	<input type="text"/>	<input type="text"/>

Pharmacy

Prescribing Doctor

Purpose

Medication 6

Name

Dosage

Schedule

Pharmacy

Prescribing Doctor

Purpose

Medication 7

Name

Dosage

Schedule

Pharmacy

Prescribing Doctor

Purpose

Medication 8

Name

Dosage

Schedule

Pharmacy

Prescribing Doctor

Purpose

Medication 9

Name

Dosage

Schedule

Pharmacy

Prescribing Doctor

Purpose

Medication 10

Name

Dosage

Schedule

Pharmacy

Prescribing Doctor

Purpose

Medical Conditions

Condition 1

Condition

Date Diagnosed

Status

Treatment Plan

Condition 2

Condition

Date Diagnosed

Status

Treatment Plan

Condition 3

Condition

Date Diagnosed

Status

Treatment Plan

Condition 4

Condition

Date Diagnosed

Status

Treatment Plan

Condition 5

Condition

Date Diagnosed

Status

Treatment Plan

Condition 6

Condition

Date Diagnosed

Status

Treatment Plan

Condition 7

Condition

Date Diagnosed

Status

Treatment Plan

Condition 8

Condition

Date Diagnosed

Status

Treatment Plan

Condition 9

Condition

Date Diagnosed

Status

Treatment Plan

Condition 10

Condition

Date Diagnosed

Status

Treatment Plan

Medical Procedures

Procedure 1

Procedure

Date

Facility

Surgeon/Doctor

Outcome

Documents Location

Procedure 2

Procedure

Date

Facility

Surgeon/Doctor

Outcome

Documents Location

Procedure 3

Procedure

Date

Facility

Surgeon/Doctor

Outcome

Documents Location

Procedure 4

Procedure

Date

Facility

Surgeon/Doctor

Outcome

Documents Location

Procedure 5

Procedure

Date

Facility

Surgeon/Doctor

Outcome

Documents Location

Procedure 6

Procedure

Date

Facility

Surgeon/Doctor

Outcome

Documents Location

Procedure 7

Procedure

Date

Facility

Surgeon/Doctor

Outcome

Documents Location

Procedure 8

Procedure

Date

Facility

Surgeon/Doctor

Outcome

Documents Location

Procedure 9

Procedure

Date

Facility

Surgeon/Doctor

Outcome

Documents Location

Procedure 10

Procedure

Date

Facility

Surgeon/Doctor

Outcome

Documents Location

Medical Devices

Device 1

Device Type	Brand	Model
<input type="text"/>	<input type="text"/>	<input type="text"/>
Serial #	Implant Date	Warranty Exp
<input type="text"/>	<input type="text"/>	<input type="text"/>
Maintenance Schedule	Supplies Info	
<input type="text"/>	<input type="text"/>	

Device 2

Device Type	Brand	Model
<input type="text"/>	<input type="text"/>	<input type="text"/>
Serial #	Implant Date	Warranty Exp
<input type="text"/>	<input type="text"/>	<input type="text"/>
Maintenance Schedule	Supplies Info	
<input type="text"/>	<input type="text"/>	

Device 3

Device Type	Brand	Model
<input type="text"/>	<input type="text"/>	<input type="text"/>
Serial #	Implant Date	Warranty Exp
<input type="text"/>	<input type="text"/>	<input type="text"/>
Maintenance Schedule	Supplies Info	
<input type="text"/>	<input type="text"/>	

Device 4

Device Type	Brand	Model
<input type="text"/>	<input type="text"/>	<input type="text"/>
Serial #	Implant Date	Warranty Exp
<input type="text"/>	<input type="text"/>	<input type="text"/>
Maintenance Schedule	Supplies Info	
<input type="text"/>	<input type="text"/>	

Device 5

Device Type	Brand	Model
<input type="text"/>	<input type="text"/>	<input type="text"/>

Serial #	Implant Date	Warranty Exp
<input type="text"/>	<input type="text"/>	<input type="text"/>

Maintenance Schedule	Supplies Info
<input type="text"/>	<input type="text"/>

Device 6

Device Type	Brand	Model
<input type="text"/>	<input type="text"/>	<input type="text"/>

Serial #	Implant Date	Warranty Exp
<input type="text"/>	<input type="text"/>	<input type="text"/>

Maintenance Schedule	Supplies Info
<input type="text"/>	<input type="text"/>

Device 7

Device Type	Brand	Model
<input type="text"/>	<input type="text"/>	<input type="text"/>

Serial #	Implant Date	Warranty Exp
<input type="text"/>	<input type="text"/>	<input type="text"/>

Maintenance Schedule	Supplies Info
<input type="text"/>	<input type="text"/>

Device 8

Device Type	Brand	Model
<input type="text"/>	<input type="text"/>	<input type="text"/>

Serial #	Implant Date	Warranty Exp
<input type="text"/>	<input type="text"/>	<input type="text"/>

Maintenance Schedule	Supplies Info
<input type="text"/>	<input type="text"/>

Device 9

Device Type	Brand	Model
<input type="text"/>	<input type="text"/>	<input type="text"/>

Serial #	Implant Date	Warranty Exp
<input type="text"/>	<input type="text"/>	<input type="text"/>

Maintenance Schedule	Supplies Info
<input type="text"/>	<input type="text"/>

Device 10

Device Type

Brand

Model

Serial #

Implant Date

Warranty Exp

Maintenance Schedule

Supplies Info

Healthcare Directives

Advance Directive Location

Living Will Location

Healthcare POA Location

DNR Orders Location

Hospice Care Preferences

Organ Donation Registered

Preferences

Notes

Stored Genetic Material

Entry 1

Type

Facility Name

Facility Phone

Storage Location / Address

Account / ID Number

Disposition Instructions

Authorization Documents Location

Notes

Entry 2

Type

Facility Name

Facility Phone

Storage Location / Address

Account / ID Number

Disposition Instructions

Authorization Documents Location

Notes

Entry 3

Type

Facility Name

Facility Phone

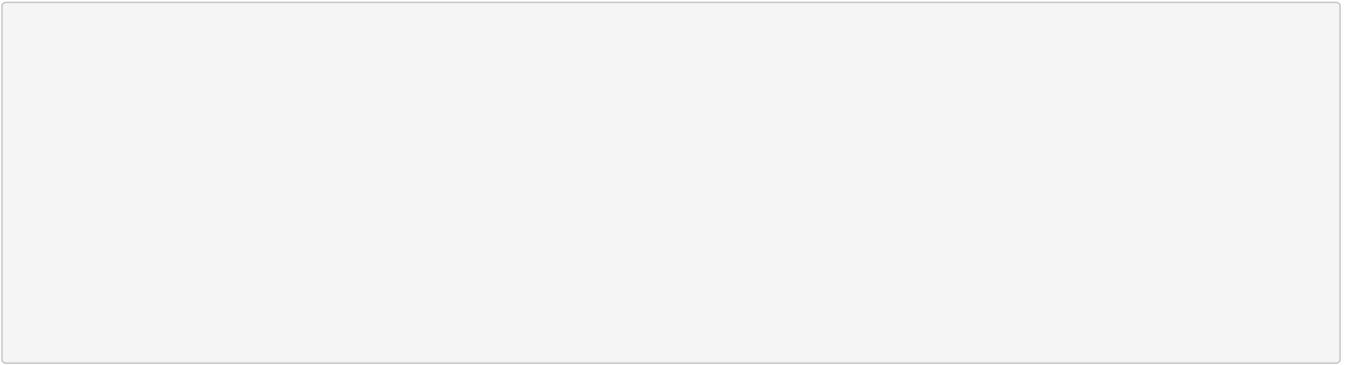
Storage Location / Address

Account / ID Number

Disposition Instructions

Authorization Documents Location

Notes



Insurance Policies

Tip: If you suspect a deceased person had a life insurance policy but can't find it, use the NAIC Life Insurance Policy Locator at eapps.naic.org/life-policy-locator/ to search for unclaimed policies.

Policy 1

Type	Provider	Policy #
<input type="text"/>	<input type="text"/>	<input type="text"/>

Effective Date	Expiration Date
<input type="text"/>	<input type="text"/>

Premium Amount	Premium Frequency	Face Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>

Agent Name	Agent Phone	Agent Email
<input type="text"/>	<input type="text"/>	<input type="text"/>

Beneficiaries

Coverage Details

Notes

Policy 2

Type <input style="width: 90%;" type="text"/>	Provider <input style="width: 90%;" type="text"/>	Policy # <input style="width: 90%;" type="text"/>
Effective Date <input style="width: 90%;" type="text"/>	Expiration Date <input style="width: 90%;" type="text"/>	
Premium Amount <input style="width: 90%;" type="text"/>	Premium Frequency <input style="width: 90%;" type="text"/>	Face Amount <input style="width: 90%;" type="text"/>
Agent Name <input style="width: 90%;" type="text"/>	Agent Phone <input style="width: 90%;" type="text"/>	Agent Email <input style="width: 90%;" type="text"/>

Beneficiaries

Coverage Details

Notes

Policy 3

Type <input type="text"/>	Provider <input type="text"/>	Policy # <input type="text"/>
Effective Date <input type="text"/>	Expiration Date <input type="text"/>	
Premium Amount <input type="text"/>	Premium Frequency <input type="text"/>	Face Amount <input type="text"/>
Agent Name <input type="text"/>	Agent Phone <input type="text"/>	Agent Email <input type="text"/>

Beneficiaries

Coverage Details

Notes

Policy 4

Type <input type="text"/>	Provider <input type="text"/>	Policy # <input type="text"/>
Effective Date <input type="text"/>	Expiration Date <input type="text"/>	
Premium Amount <input type="text"/>	Premium Frequency <input type="text"/>	Face Amount <input type="text"/>
Agent Name <input type="text"/>	Agent Phone <input type="text"/>	Agent Email <input type="text"/>

Beneficiaries

Coverage Details

Notes

Policy 5

Type <input type="text"/>	Provider <input type="text"/>	Policy # <input type="text"/>
Effective Date <input type="text"/>	Expiration Date <input type="text"/>	
Premium Amount <input type="text"/>	Premium Frequency <input type="text"/>	Face Amount <input type="text"/>
Agent Name <input type="text"/>	Agent Phone <input type="text"/>	Agent Email <input type="text"/>

Beneficiaries

Coverage Details

Notes

Policy 6

Type <input type="text"/>	Provider <input type="text"/>	Policy # <input type="text"/>
Effective Date <input type="text"/>	Expiration Date <input type="text"/>	
Premium Amount <input type="text"/>	Premium Frequency <input type="text"/>	Face Amount <input type="text"/>
Agent Name <input type="text"/>	Agent Phone <input type="text"/>	Agent Email <input type="text"/>

Beneficiaries

Coverage Details

Notes

Policy 7

Type <input type="text"/>	Provider <input type="text"/>	Policy # <input type="text"/>
Effective Date <input type="text"/>	Expiration Date <input type="text"/>	
Premium Amount <input type="text"/>	Premium Frequency <input type="text"/>	Face Amount <input type="text"/>
Agent Name <input type="text"/>	Agent Phone <input type="text"/>	Agent Email <input type="text"/>

Beneficiaries

Coverage Details

Notes

Policy 8

Type <input style="width: 90%;" type="text"/>	Provider <input style="width: 90%;" type="text"/>	Policy # <input style="width: 90%;" type="text"/>
Effective Date <input style="width: 90%;" type="text"/>	Expiration Date <input style="width: 90%;" type="text"/>	
Premium Amount <input style="width: 90%;" type="text"/>	Premium Frequency <input style="width: 90%;" type="text"/>	Face Amount <input style="width: 90%;" type="text"/>
Agent Name <input style="width: 90%;" type="text"/>	Agent Phone <input style="width: 90%;" type="text"/>	Agent Email <input style="width: 90%;" type="text"/>

Beneficiaries

Coverage Details

Notes

Policy 9

Type <input style="width: 90%;" type="text"/>	Provider <input style="width: 90%;" type="text"/>	Policy # <input style="width: 90%;" type="text"/>
Effective Date <input style="width: 90%;" type="text"/>	Expiration Date <input style="width: 90%;" type="text"/>	
Premium Amount <input style="width: 90%;" type="text"/>	Premium Frequency <input style="width: 90%;" type="text"/>	Face Amount <input style="width: 90%;" type="text"/>
Agent Name <input style="width: 90%;" type="text"/>	Agent Phone <input style="width: 90%;" type="text"/>	Agent Email <input style="width: 90%;" type="text"/>

Beneficiaries

Coverage Details

Notes

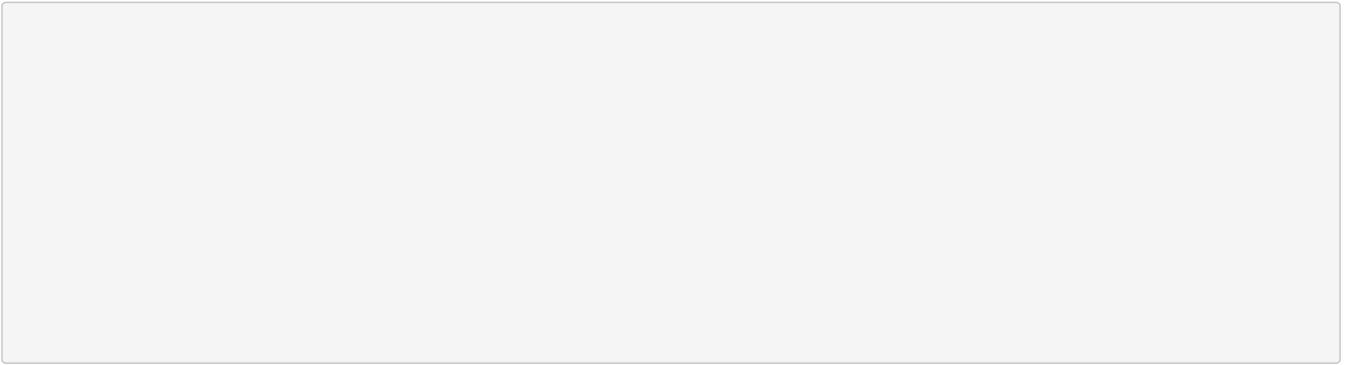
Policy 10

Type <input type="text"/>	Provider <input type="text"/>	Policy # <input type="text"/>
Effective Date <input type="text"/>	Expiration Date <input type="text"/>	
Premium Amount <input type="text"/>	Premium Frequency <input type="text"/>	Face Amount <input type="text"/>
Agent Name <input type="text"/>	Agent Phone <input type="text"/>	Agent Email <input type="text"/>

Beneficiaries

Coverage Details

Notes



Employment & Benefits

Accountant Name

Accountant Firm

Accountant Phone

Tax Returns Location

Pension Plan Details

Retirement Account Beneficiaries

Union Name

Union Local

Union Phone

Notes

Employer 1

Employer Name

Currently Employed?

HR Contact

HR Phone

Benefits Notes

Employer 2

Employer Name

Currently Employed?

HR Contact

HR Phone

Benefits Notes

Employer 3

Employer Name

Currently Employed?

HR Contact

HR Phone

Benefits Notes

Employer 4

Employer Name

Currently Employed?

HR Contact

HR Phone

Benefits Notes

Employer 5

Employer Name

Currently Employed?

HR Contact

HR Phone

Benefits Notes

Employer 6

Employer Name

Currently Employed?

HR Contact

HR Phone

Benefits Notes

Employer 7

Employer Name

Currently Employed?

HR Contact

HR Phone

Benefits Notes

Employer 8

Employer Name

Currently Employed?

HR Contact

HR Phone

Benefits Notes

Employer 9

Employer Name

Currently Employed?

HR Contact

HR Phone

Benefits Notes

Employer 10

Employer Name

Currently Employed?

HR Contact

HR Phone

Benefits Notes

Government Benefits

Benefit 1

Type

Details

Contact Info

Notes

Benefit 2

Type

Details

Contact Info

Notes

Benefit 3

Type

Details

Contact Info

Notes

Benefit 4

Type

Details

Contact Info

Notes

Benefit 5

Type

Details

Contact Info

Notes

Benefit 6

Type

Details

Contact Info

Notes

Benefit 7

Type

Details

Contact Info

Notes

Benefit 8

Type

Details

Contact Info

Notes

Benefit 9

Type

Details

Contact Info

Notes

Benefit 10

Type

Details

Contact Info

Notes

Military Service

Service Record 1

Branch

Rank

Service #

DD-214 Location

VA Claim #

Notes

Service Record 2

Branch

Rank

Service #

DD-214 Location

VA Claim #

Notes

Service Record 3

Branch

Rank

Service #

DD-214 Location

VA Claim #

Notes

Service Record 4

Branch

Rank

Service #

DD-214 Location

VA Claim #

Notes

Service Record 5

Branch

Rank

Service #

DD-214 Location

VA Claim #

Notes

Service Record 6

Branch

Rank

Service #

DD-214 Location

VA Claim #

Notes

Service Record 7

Branch

Rank

Service #

DD-214 Location

VA Claim #

Notes

Service Record 8

Branch

Rank

Service #

DD-214 Location

VA Claim #

Notes

Service Record 9

Branch

Rank

Service #

DD-214 Location

VA Claim #

Notes

Service Record 10

Branch

Rank

Service #

DD-214 Location

VA Claim #

Notes

Bank Accounts

Account 1

Type	Institution	Account #
<input type="text"/>	<input type="text"/>	<input type="text"/>
Routing #	Authorized Users	
<input type="text"/>	<input type="text"/>	
POD Beneficiary	TOD Beneficiary	
<input type="text"/>	<input type="text"/>	
Checks Location	ATM/Debit Info	PIN Hint
<input type="text"/>	<input type="text"/>	<input type="text"/>

Automated Payments

Notes

Account 2

Type	Institution	Account #
<input type="text"/>	<input type="text"/>	<input type="text"/>
Routing #	Authorized Users	
<input type="text"/>	<input type="text"/>	
POD Beneficiary	TOD Beneficiary	
<input type="text"/>	<input type="text"/>	

Checks Location

ATM/Debit Info

PIN Hint

Automated Payments

Notes

Account 3

Type

Institution

Account #

Routing #

Authorized Users

POD Beneficiary

TOD Beneficiary

Checks Location

ATM/Debit Info

PIN Hint

Automated Payments

Notes

Account 4

Type <input type="text"/>	Institution <input type="text"/>	Account # <input type="text"/>
Routing # <input type="text"/>	Authorized Users <input type="text"/>	
POD Beneficiary <input type="text"/>	TOD Beneficiary <input type="text"/>	
Checks Location <input type="text"/>	ATM/Debit Info <input type="text"/>	PIN Hint <input type="text"/>

Automated Payments

Notes

Account 5

Type

Institution

Account #

Routing #

Authorized Users

POD Beneficiary

TOD Beneficiary

Checks Location

ATM/Debit Info

PIN Hint

Automated Payments

Notes

Account 6

Type	Institution	Account #
<input type="text"/>	<input type="text"/>	<input type="text"/>

Routing #	Authorized Users
<input type="text"/>	<input type="text"/>

POD Beneficiary	TOD Beneficiary
<input type="text"/>	<input type="text"/>

Checks Location	ATM/Debit Info	PIN Hint
<input type="text"/>	<input type="text"/>	<input type="text"/>

Automated Payments

Notes

Account 7

Type	Institution	Account #
<input type="text"/>	<input type="text"/>	<input type="text"/>

Routing #	Authorized Users
<input type="text"/>	<input type="text"/>

POD Beneficiary	TOD Beneficiary
<input type="text"/>	<input type="text"/>

Checks Location	ATM/Debit Info	PIN Hint
<input type="text"/>	<input type="text"/>	<input type="text"/>

Automated Payments

Notes

Account 8

Type <input type="text"/>	Institution <input type="text"/>	Account # <input type="text"/>
Routing # <input type="text"/>	Authorized Users <input type="text"/>	
POD Beneficiary <input type="text"/>	TOD Beneficiary <input type="text"/>	
Checks Location <input type="text"/>	ATM/Debit Info <input type="text"/>	PIN Hint <input type="text"/>

Automated Payments

Notes

Account 9

Type	Institution	Account #
<input type="text"/>	<input type="text"/>	<input type="text"/>
Routing #	Authorized Users	
<input type="text"/>	<input type="text"/>	
POD Beneficiary	TOD Beneficiary	
<input type="text"/>	<input type="text"/>	
Checks Location	ATM/Debit Info	PIN Hint
<input type="text"/>	<input type="text"/>	<input type="text"/>

Automated Payments

Notes

Account 10

Type

Institution

Account #

Routing #

Authorized Users

POD Beneficiary

TOD Beneficiary

Checks Location

ATM/Debit Info

PIN Hint

Automated Payments

Notes

Credit Cards

Card 1

Issuer

Card Name

Last 4 Digits

Expiration

Customer Service Phone

Current Balance

Credit Limit

Interest Rate

Credit Insurance / Balance Protection

Notes

Card 2

Issuer

Card Name

Last 4 Digits

Expiration

Customer Service Phone

Current Balance

Credit Limit

Interest Rate

Credit Insurance / Balance Protection

Notes

Card 3

Issuer

Card Name

Last 4 Digits

Expiration

Customer Service Phone

Current Balance

Credit Limit

Interest Rate

Credit Insurance / Balance Protection

Notes

Card 4

Issuer

Card Name

Last 4 Digits

Expiration

Customer Service Phone

Current Balance

Credit Limit

Interest Rate

Credit Insurance / Balance Protection

Notes

Card 5

Issuer

Card Name

Last 4 Digits

Expiration

Customer Service Phone

Current Balance

Credit Limit

Interest Rate

Credit Insurance / Balance Protection

Notes

Card 6

Issuer

Card Name

Last 4 Digits

Expiration

Customer Service Phone

Current Balance

Credit Limit

Interest Rate

Credit Insurance / Balance Protection

Notes

Card 7

Issuer

Card Name

Last 4 Digits

Expiration

Customer Service Phone

Current Balance

Credit Limit

Interest Rate

Credit Insurance / Balance Protection

Notes

Card 8

Issuer

Card Name

Last 4 Digits

Expiration

Customer Service Phone

Current Balance

Credit Limit

Interest Rate

Credit Insurance / Balance Protection

Notes

Card 9

Issuer

Card Name

Last 4 Digits

Expiration

Customer Service Phone

Current Balance

Credit Limit

Interest Rate

Credit Insurance / Balance Protection

Notes

Card 10

Issuer

Card Name

Last 4 Digits

Expiration

Customer Service Phone

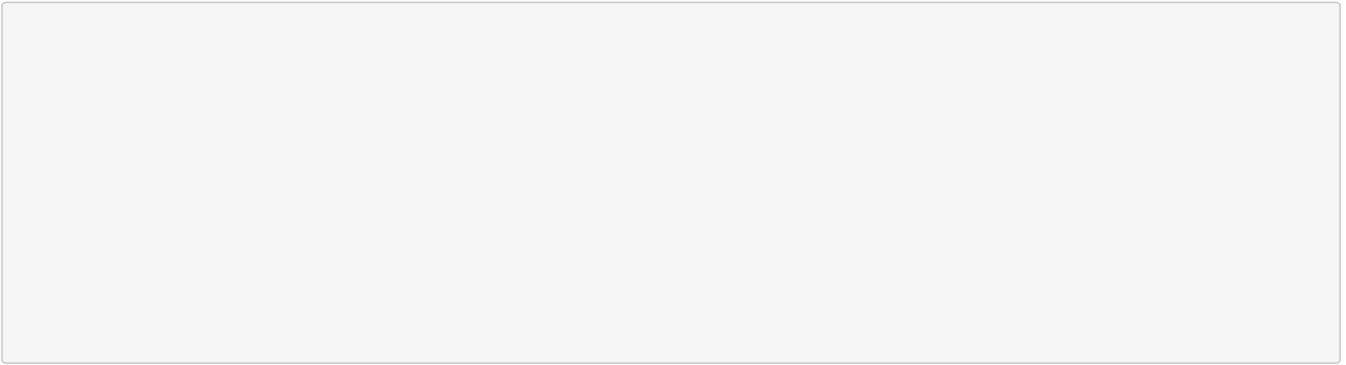
Current Balance

Credit Limit

Interest Rate

Credit Insurance / Balance Protection

Notes



Safe Deposit Boxes

Box 1

Institution

Branch Location

Box Number

Key Location

Authorized Accessors

Contents

Box 2

Institution

Branch Location

Box Number

Key Location

Authorized Accessors

Contents

Box 3

Institution

Branch Location

Box Number

Key Location

Authorized Accessors

Contents

Box 4

Institution

Branch Location

Box Number

Key Location

Authorized Accessors

Contents

Box 5

Institution

Branch Location

Box Number

Key Location

Authorized Accessors

Contents

Investment Accounts

Account 1

Type

Institution

Account #

Advisor

Phone

TOD / Beneficiary Designation

Beneficiaries

Tax Basis Information

Notes

Account 2

Type

Institution

Account #

Advisor

Phone

TOD / Beneficiary Designation

Beneficiaries

Tax Basis Information

Notes

Account 3

Type

Institution

Account #

Advisor

Phone

TOD / Beneficiary Designation

Beneficiaries

Tax Basis Information

Notes

Account 4

Type

Institution

Account #

Advisor

Phone

TOD / Beneficiary Designation

Beneficiaries

Tax Basis Information

Notes

Account 5

Type

Institution

Account #

Advisor

Phone

TOD / Beneficiary Designation

Beneficiaries

Tax Basis Information

Notes

Account 6

Type

Institution

Account #

Advisor

Phone

TOD / Beneficiary Designation

Beneficiaries

Tax Basis Information

Notes

Account 7

Type	Institution	Account #
<input type="text"/>	<input type="text"/>	<input type="text"/>

Advisor	Phone
<input type="text"/>	<input type="text"/>

TOD / Beneficiary Designation

Beneficiaries

Tax Basis Information

Notes

Account 8

Type	Institution	Account #
<input type="text"/>	<input type="text"/>	<input type="text"/>

Advisor	Phone
<input type="text"/>	<input type="text"/>

TOD / Beneficiary Designation

Beneficiaries

Tax Basis Information

Notes

Account 9

Type

Institution

Account #

Advisor

Phone

TOD / Beneficiary Designation

Beneficiaries

Tax Basis Information

Notes

Account 10

Type

Institution

Account #

Advisor

Phone

TOD / Beneficiary Designation

Beneficiaries

Empty rectangular box for Beneficiaries information.

Tax Basis Information

Empty rectangular box for Tax Basis Information.

Notes

Empty rectangular box for Notes.

Cryptocurrency & Web3

WARNING: Unlike banks, there is no customer service, password reset, or FDIC insurance for cryptocurrency. If private keys or seed phrases are lost, assets are gone permanently.

Recovery Verified By

Verification Date

Verification Notes

Has executor tested recovery?

Wallet 1

Type

Name

Provider

Seed Phrase Location

Approx Value

Notes

Wallet 2

Type

Name

Provider

Seed Phrase Location

Approx Value

Notes

Wallet 3

Type

Name

Provider

Seed Phrase Location

Approx Value

Notes

Wallet 4

Type

Name

Provider

Seed Phrase Location

Approx Value

Notes

Wallet 5

Type

Name

Provider

Seed Phrase Location

Approx Value

Notes

Wallet 6

Type

Name

Provider

Seed Phrase Location

Approx Value

Notes

Wallet 7

Type

Name

Provider

Seed Phrase Location

Approx Value

Notes

Wallet 8

Type

Name

Provider

Seed Phrase Location

Approx Value

Notes

Wallet 9

Type

Name

Provider

Seed Phrase Location

Approx Value

Notes

Wallet 10

Type	Name	Provider
<input type="text"/>	<input type="text"/>	<input type="text"/>

Seed Phrase Location	Approx Value
<input type="text"/>	<input type="text"/>

Notes

Staking Position 1

Asset	Staking Provider	Staking Type
<input type="text"/>	<input type="text"/>	<input type="text"/>

Lockup Period	Approximate Amount
<input type="text"/>	<input type="text"/>

Staking Position 2

Asset	Staking Provider	Staking Type
<input type="text"/>	<input type="text"/>	<input type="text"/>

Lockup Period	Approximate Amount
<input type="text"/>	<input type="text"/>

Staking Position 3

Asset	Staking Provider	Staking Type
<input type="text"/>	<input type="text"/>	<input type="text"/>

Lockup Period	Approximate Amount
<input type="text"/>	<input type="text"/>

Staking Position 4

Asset	Staking Provider	Staking Type
<input type="text"/>	<input type="text"/>	<input type="text"/>

Lockup Period	Approximate Amount
<input type="text"/>	<input type="text"/>

Staking Position 5

Asset

Staking Provider

Staking Type

Lockup Period

Approximate Amount

DeFi Position 1

Protocol

Chain

Position Type

Assets

Wallet Used

Approx Value

Risks

Exit Instructions

DeFi Position 2

Protocol

Chain

Position Type

Assets

Wallet Used

Approx Value

Risks

Exit Instructions

DeFi Position 3

Protocol

Chain

Position Type

Assets

Wallet Used

Approx Value

Risks

Exit Instructions

DeFi Position 4

Protocol

Chain

Position Type

Assets

Wallet Used

Approx Value

Risks

Exit Instructions

DeFi Position 5

Protocol

Chain

Position Type

Assets

Wallet Used

Approx Value

Risks

Exit Instructions

NFT Collection 1

Collection Name	Marketplace	Chain
<input type="text"/>	<input type="text"/>	<input type="text"/>

Wallet Stored In	# Items	Approx Value
<input type="text"/>	<input type="text"/>	<input type="text"/>

Notable Items

NFT Collection 2

Collection Name	Marketplace	Chain
<input type="text"/>	<input type="text"/>	<input type="text"/>

Wallet Stored In	# Items	Approx Value
<input type="text"/>	<input type="text"/>	<input type="text"/>

Notable Items

NFT Collection 3

Collection Name	Marketplace	Chain
<input type="text"/>	<input type="text"/>	<input type="text"/>

Wallet Stored In	# Items	Approx Value
<input type="text"/>	<input type="text"/>	<input type="text"/>

Notable Items

NFT Collection 4

Collection Name

Marketplace

Chain

Wallet Stored In

Items

Approx Value

Notable Items

NFT Collection 5

Collection Name

Marketplace

Chain

Wallet Stored In

Items

Approx Value

Notable Items

Loans & Debts

Loan/Debt 1

Type	Lender	Balance
<input type="text"/>	<input type="text"/>	<input type="text"/>

Monthly Payment	Due Date
<input type="text"/>	<input type="text"/>

Collateral	Co-signer	Forgiven on Death?
<input type="text"/>	<input type="text"/>	<input type="text"/>

Notes

Loan/Debt 2

Type	Lender	Balance
<input type="text"/>	<input type="text"/>	<input type="text"/>

Monthly Payment	Due Date
<input type="text"/>	<input type="text"/>

Collateral	Co-signer	Forgiven on Death?
<input type="text"/>	<input type="text"/>	<input type="text"/>

Notes

Loan/Debt 3

Type	Lender	Balance
<input type="text"/>	<input type="text"/>	<input type="text"/>

Monthly Payment	Due Date
<input type="text"/>	<input type="text"/>

Collateral	Co-signer	Forgiven on Death?
<input type="text"/>	<input type="text"/>	<input type="text"/>

Notes

Loan/Debt 4

Type	Lender	Balance
<input type="text"/>	<input type="text"/>	<input type="text"/>

Monthly Payment	Due Date
<input type="text"/>	<input type="text"/>

Collateral	Co-signer	Forgiven on Death?
<input type="text"/>	<input type="text"/>	<input type="text"/>

Notes

Loan/Debt 5

Type	Lender	Balance
<input type="text"/>	<input type="text"/>	<input type="text"/>

Monthly Payment	Due Date
<input type="text"/>	<input type="text"/>

Collateral

Co-signer

Forgiven on Death?

Notes

Loan/Debt 6

Type

Lender

Balance

Monthly Payment

Due Date

Collateral

Co-signer

Forgiven on Death?

Notes

Loan/Debt 7

Type

Lender

Balance

Monthly Payment

Due Date

Collateral

Co-signer

Forgiven on Death?

Notes

Loan/Debt 8

Type	Lender	Balance
<input type="text"/>	<input type="text"/>	<input type="text"/>
Monthly Payment	Due Date	
<input type="text"/>	<input type="text"/>	
Collateral	Co-signer	Forgiven on Death?
<input type="text"/>	<input type="text"/>	<input type="text"/>

Notes

Loan/Debt 9

Type	Lender	Balance
<input type="text"/>	<input type="text"/>	<input type="text"/>
Monthly Payment	Due Date	
<input type="text"/>	<input type="text"/>	
Collateral	Co-signer	Forgiven on Death?
<input type="text"/>	<input type="text"/>	<input type="text"/>

Notes

Loan/Debt 10

Type <input style="width: 95%;" type="text"/>	Lender <input style="width: 95%;" type="text"/>	Balance <input style="width: 95%;" type="text"/>
Monthly Payment <input style="width: 95%;" type="text"/>	Due Date <input style="width: 95%;" type="text"/>	
Collateral <input style="width: 95%;" type="text"/>	Co-signer <input style="width: 95%;" type="text"/>	Forgiven on Death? <input style="width: 95%;" type="text"/>

Notes

Loan/Debt 11

Type <input style="width: 95%;" type="text"/>	Lender <input style="width: 95%;" type="text"/>	Balance <input style="width: 95%;" type="text"/>
Monthly Payment <input style="width: 95%;" type="text"/>	Due Date <input style="width: 95%;" type="text"/>	
Collateral <input style="width: 95%;" type="text"/>	Co-signer <input style="width: 95%;" type="text"/>	Forgiven on Death? <input style="width: 95%;" type="text"/>

Notes

Loan/Debt 12

Type	Lender	Balance
<input type="text"/>	<input type="text"/>	<input type="text"/>
Monthly Payment	Due Date	
<input type="text"/>	<input type="text"/>	
Collateral	Co-signer	Forgiven on Death?
<input type="text"/>	<input type="text"/>	<input type="text"/>

Notes

Loan/Debt 13

Type	Lender	Balance
<input type="text"/>	<input type="text"/>	<input type="text"/>
Monthly Payment	Due Date	
<input type="text"/>	<input type="text"/>	
Collateral	Co-signer	Forgiven on Death?
<input type="text"/>	<input type="text"/>	<input type="text"/>

Notes

Loan/Debt 14

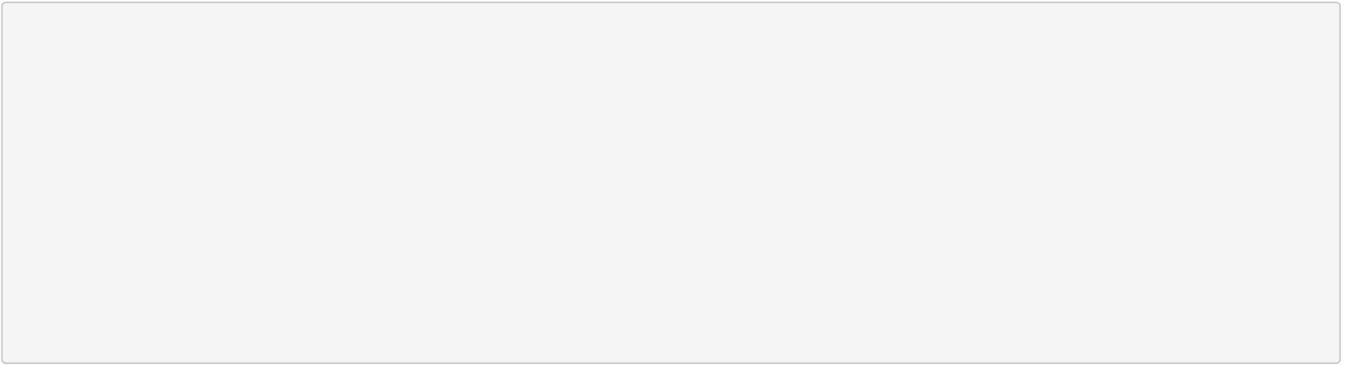
Type	Lender	Balance
<input type="text"/>	<input type="text"/>	<input type="text"/>
Monthly Payment	Due Date	
<input type="text"/>	<input type="text"/>	
Collateral	Co-signer	Forgiven on Death?
<input type="text"/>	<input type="text"/>	<input type="text"/>

Notes

Loan/Debt 15

Type	Lender	Balance
<input type="text"/>	<input type="text"/>	<input type="text"/>
Monthly Payment	Due Date	
<input type="text"/>	<input type="text"/>	
Collateral	Co-signer	Forgiven on Death?
<input type="text"/>	<input type="text"/>	<input type="text"/>

Notes



Debts Owed to You

Debt 1

Debtor Name

Contact Info

Original Amount

Current Balance

Originating Date

Final Payment Date

Notes

Debt 2

Debtor Name

Contact Info

Original Amount

Current Balance

Originating Date

Final Payment Date

Notes

Debt 3

Debtor Name

Contact Info

Original Amount

Current Balance

Originating Date

Final Payment Date

Notes

Debt 4

Debtor Name

Contact Info

Original Amount

Current Balance

Originating Date

Final Payment Date

Notes

Debt 5

Debtor Name

Contact Info

Original Amount

Current Balance

Originating Date

Final Payment Date

Notes

Business Interests

Business 1

Entity Name

Entity Type

Ownership %

Primary Contact Name

Primary Contact Phone

Governing Agreement Location

Distribution Schedule

Notes

Business 2

Entity Name

Entity Type

Ownership %

Primary Contact Name

Primary Contact Phone

Governing Agreement Location

Distribution Schedule

Notes

Business 3

Entity Name

Entity Type

Ownership %

Primary Contact Name

Primary Contact Phone

Governing Agreement Location

Distribution Schedule

Notes

Business 4

Entity Name

Entity Type

Ownership %

Primary Contact Name

Primary Contact Phone

Governing Agreement Location

Distribution Schedule

Notes

Business 5

Entity Name

Entity Type

Ownership %

Primary Contact Name

Primary Contact Phone

Governing Agreement Location

Distribution Schedule

Notes

Business 6

Entity Name

Entity Type

Ownership %

Primary Contact Name

Primary Contact Phone

Governing Agreement Location

Distribution Schedule

Notes

Business 7

Entity Name

Entity Type

Ownership %

Primary Contact Name

Primary Contact Phone

Governing Agreement Location

Distribution Schedule

Notes

Business 8

Entity Name

Entity Type

Ownership %

Primary Contact Name

Primary Contact Phone

Governing Agreement Location

Distribution Schedule

Notes

Business 9

Entity Name

Entity Type

Ownership %

Primary Contact Name

Primary Contact Phone

Governing Agreement Location

Distribution Schedule

Notes

Business 10

Entity Name

Entity Type

Ownership %

Primary Contact Name

Primary Contact Phone

Governing Agreement Location

Distribution Schedule

Notes

Business 11

Entity Name

Entity Type

Ownership %

Primary Contact Name

Primary Contact Phone

Governing Agreement Location

Distribution Schedule

Notes

Business 12

Entity Name

Entity Type

Ownership %

Primary Contact Name

Primary Contact Phone

Governing Agreement Location

Distribution Schedule

Notes

Business 13

Entity Name

Entity Type

Ownership %

Primary Contact Name

Primary Contact Phone

Governing Agreement Location

Distribution Schedule

Notes

Business 14

Entity Name

Entity Type

Ownership %

Primary Contact Name

Primary Contact Phone

Governing Agreement Location

Distribution Schedule

Notes

Business 15

Entity Name

Entity Type

Ownership %

Primary Contact Name

Primary Contact Phone

Governing Agreement Location

Distribution Schedule

Notes

Trusts

Trust 1

Trust Name

Trust Type

Current Trustee

Trustee Phone

Successor Trustee

Successor Phone

Notes

Trust 2

Trust Name

Trust Type

Current Trustee

Trustee Phone

Successor Trustee

Successor Phone

Notes

Trust 3

Trust Name

Trust Type

Current Trustee

Trustee Phone

Successor Trustee

Successor Phone

Notes

Trust 4

Trust Name

Trust Type

Current Trustee

Trustee Phone

Successor Trustee

Successor Phone

Notes

Trust 5

Trust Name

Trust Type

Current Trustee

Trustee Phone

Successor Trustee

Successor Phone

Notes

Trust 6

Trust Name

Trust Type

Current Trustee

Trustee Phone

Successor Trustee

Successor Phone

Notes

Trust 7

Trust Name

Trust Type

Current Trustee

Trustee Phone

Successor Trustee

Successor Phone

Notes

Trust 8

Trust Name

Trust Type

Current Trustee

Trustee Phone

Successor Trustee

Successor Phone

Notes

Trust 9

Trust Name

Trust Type

Current Trustee

Trustee Phone

Successor Trustee

Successor Phone

Notes

Trust 10

Trust Name

Trust Type

Current Trustee

Trustee Phone

Successor Trustee

Successor Phone

Notes

Legal Agreements

Agreement 1

Agreement Type

Other Party Name

Date Executed

Document Location

Attorney Name

Attorney Phone

Notes

Agreement 2

Agreement Type

Other Party Name

Date Executed

Document Location

Attorney Name

Attorney Phone

Notes

Agreement 3

Agreement Type

Other Party Name

Date Executed

Document Location

Attorney Name

Attorney Phone

Notes

Agreement 4

Agreement Type

Other Party Name

Date Executed

Document Location

Attorney Name

Attorney Phone

Notes

Agreement 5

Agreement Type

Other Party Name

Date Executed

Document Location

Attorney Name

Attorney Phone

Notes

Real Estate

Property 1

Type

Address

Mortgage Lender

Account #

Insurance Provider

Policy #

Utility Providers

Lawn/Snow Service

Cleaning Service

Tenant Info

Notes

Property 2

Type

Address

Mortgage Lender

Account #

Insurance Provider

Policy #

Utility Providers

Lawn/Snow Service

Cleaning Service

Tenant Info

Notes

Property 3

Type

Address

Mortgage Lender

Account #

Insurance Provider

Policy #

Utility Providers

Lawn/Snow Service

Cleaning Service

Tenant Info

Notes

Property 4

Type

Address

Mortgage Lender

Account #

Insurance Provider

Policy #

Utility Providers

Lawn/Snow Service

Cleaning Service

Tenant Info

Notes

Property 5

Type

Address

Mortgage Lender

Account #

Insurance Provider

Policy #

Utility Providers

Lawn/Snow Service

Cleaning Service

Tenant Info

Notes

Property 6

Type

Address

Mortgage Lender

Account #

Insurance Provider

Policy #

Utility Providers

Lawn/Snow Service

Cleaning Service

Tenant Info

Notes

Property 7

Type

Address

Mortgage Lender

Account #

Insurance Provider

Policy #

Utility Providers

Lawn/Snow Service

Cleaning Service

Tenant Info

Notes

Property 8

Type

Address

Mortgage Lender

Account #

Insurance Provider

Policy #

Utility Providers

Lawn/Snow Service

Cleaning Service

Tenant Info

Notes

Property 9

Type

Address

Mortgage Lender

Account #

Insurance Provider

Policy #

Utility Providers

Lawn/Snow Service

Cleaning Service

Tenant Info

Notes

Property 10

Type

Address

Mortgage Lender

Account #

Insurance Provider

Policy #

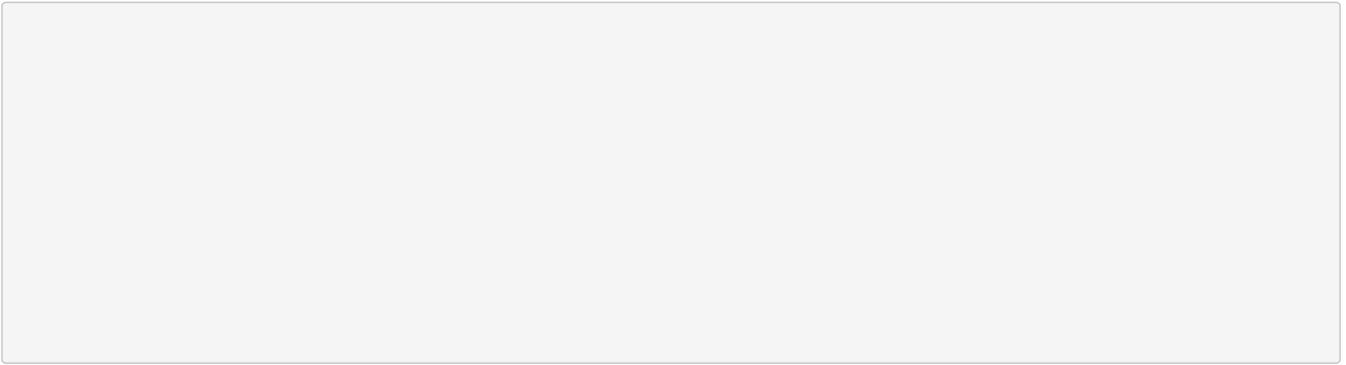
Utility Providers

Lawn/Snow Service

Cleaning Service

Tenant Info

Notes



Vehicles

Vehicle 1

Year	Make	Model
<input type="text"/>	<input type="text"/>	<input type="text"/>
VIN	License Plate	
<input type="text"/>	<input type="text"/>	
Title Location	Insurance	
<input type="text"/>	<input type="text"/>	
Spare Key Location	Odometer/Hours	
<input type="text"/>	<input type="text"/>	

Notes

Vehicle 2

Year	Make	Model
<input type="text"/>	<input type="text"/>	<input type="text"/>
VIN	License Plate	
<input type="text"/>	<input type="text"/>	
Title Location	Insurance	
<input type="text"/>	<input type="text"/>	
Spare Key Location	Odometer/Hours	
<input type="text"/>	<input type="text"/>	

Notes

Vehicle 3

Year

Make

Model

VIN

License Plate

Title Location

Insurance

Spare Key Location

Odometer/Hours

Notes

Vehicle 4

Year

Make

Model

VIN

License Plate

Title Location

Insurance

Spare Key Location

Odometer/Hours

Notes

Vehicle 5

Year	Make	Model
<input type="text"/>	<input type="text"/>	<input type="text"/>
VIN	License Plate	
<input type="text"/>	<input type="text"/>	
Title Location	Insurance	
<input type="text"/>	<input type="text"/>	
Spare Key Location	Odometer/Hours	
<input type="text"/>	<input type="text"/>	

Notes

Vehicle 6

Year	Make	Model
<input type="text"/>	<input type="text"/>	<input type="text"/>
VIN	License Plate	
<input type="text"/>	<input type="text"/>	
Title Location	Insurance	
<input type="text"/>	<input type="text"/>	
Spare Key Location	Odometer/Hours	
<input type="text"/>	<input type="text"/>	

Notes

Vehicle 7

Year	Make	Model
<input type="text"/>	<input type="text"/>	<input type="text"/>
VIN	License Plate	
<input type="text"/>	<input type="text"/>	
Title Location	Insurance	
<input type="text"/>	<input type="text"/>	
Spare Key Location	Odometer/Hours	
<input type="text"/>	<input type="text"/>	

Notes

Vehicle 8

Year	Make	Model
<input type="text"/>	<input type="text"/>	<input type="text"/>
VIN	License Plate	
<input type="text"/>	<input type="text"/>	
Title Location	Insurance	
<input type="text"/>	<input type="text"/>	
Spare Key Location	Odometer/Hours	
<input type="text"/>	<input type="text"/>	

Notes

Vehicle 9

Year

Make

Model

VIN

License Plate

Title Location

Insurance

Spare Key Location

Odometer/Hours

Notes

Vehicle 10

Year

Make

Model

VIN

License Plate

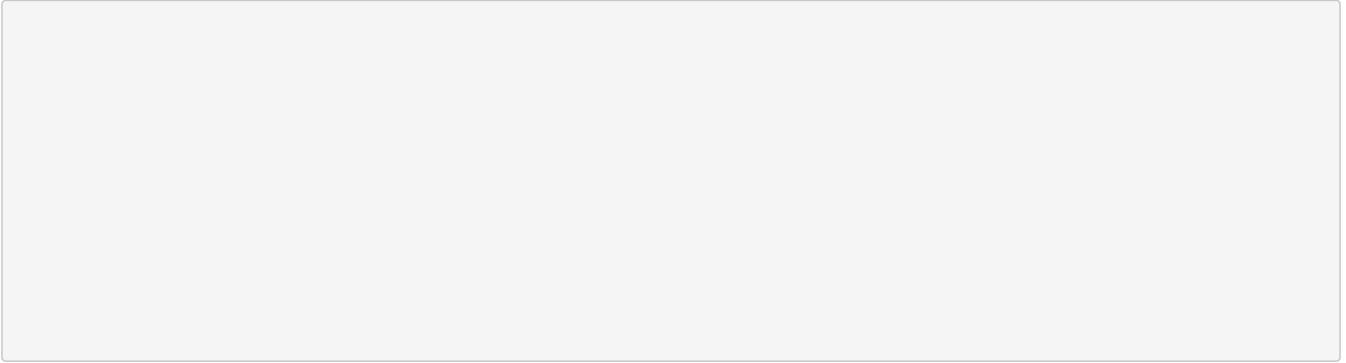
Title Location

Insurance

Spare Key Location

Odometer/Hours

Notes



Firearms

Firearm 1

Type

Make

Model

Caliber

Serial #

Storage Location

Registration Info

Notes

Firearm 2

Type

Make

Model

Caliber

Serial #

Storage Location

Registration Info

Notes

Firearm 3

Type Make Model

Caliber Serial #

Storage Location Registration Info

Notes

Firearm 4

Type Make Model

Caliber Serial #

Storage Location Registration Info

Notes

Firearm 5

Type Make Model

Caliber Serial #

Storage Location

Registration Info

Notes

Firearm 6

Type

Make

Model

Caliber

Serial #

Storage Location

Registration Info

Notes

Firearm 7

Type

Make

Model

Caliber

Serial #

Storage Location

Registration Info

Notes

Firearm 8

Type

Make

Model

Caliber

Serial #

Storage Location

Registration Info

Notes

Firearm 9

Type

Make

Model

Caliber

Serial #

Storage Location

Registration Info

Notes

Firearm 10

Type

Make

Model

Caliber

Serial #

Storage Location

Registration Info

Notes

Storage Units

Storage Unit 1

Facility Name

Unit Number

Monthly Cost

Address

Access Code / Key Location

Payment Method

Contents Description

Notes

Storage Unit 2

Facility Name

Unit Number

Monthly Cost

Address

Access Code / Key Location

Payment Method

Contents Description

Notes

Storage Unit 3

Facility Name

Unit Number

Monthly Cost

Address

Access Code / Key Location

Payment Method

Contents Description

Notes

Storage Unit 4

Facility Name

Unit Number

Monthly Cost

Address

Access Code / Key Location

Payment Method

Contents Description

Notes

Storage Unit 5

Facility Name

Unit Number

Monthly Cost

Address

Access Code / Key Location

Payment Method

Contents Description

Notes

Valuables

Valuable 1

Type

Description

Location

Insurance Info

Notes

Valuable 2

Type

Description

Location

Insurance Info

Notes

Valuable 3

Type

Description

Location

Insurance Info

Notes

Valuable 4

Type

Description

Location

Insurance Info

Notes

Valuable 5

Type

Description

Location

Insurance Info

Notes

Valuable 6

Type

Description

Location

Insurance Info

Notes

Valuable 7

Type

Description

Location

Insurance Info

Notes

Valuable 8

Type

Description

Location

Insurance Info

Notes

Valuable 9

Type

Description

Location

Insurance Info

Notes

Valuable 10

Type

Description

Location

Insurance Info

Notes

Valuable 11

Type

Description

Location

Insurance Info

Notes

Valuable 12

Type

Description

Location

Insurance Info

Notes

Valuable 13

Type

Description

Location

Insurance Info

Notes

Valuable 14

Type

Description

Location

Insurance Info

Notes

Valuable 15

Type

Description

Location

Insurance Info

Notes

Valuable 16

Type

Description

Location

Insurance Info

Notes

Valuable 17

Type

Description

Location

Insurance Info

Notes

Valuable 18

Type

Description

Location

Insurance Info

Notes

Valuable 19

Type

Description

Location

Insurance Info

Notes

Valuable 20

Type

Description

Location

Insurance Info

Notes

Valuable 21

Type

Description

Location

Insurance Info

Notes

Valuable 22

Type

Description

Location

Insurance Info

Notes

Valuable 23

Type

Description

Location

Insurance Info

Notes

Valuable 24

Type

Description

Location

Insurance Info

Notes

Valuable 25

Type

Description

Location

Insurance Info

Notes

Personal Property Distribution

Bequest 1

Item

Intended Recipient

Special Instructions

Bequest 2

Item

Intended Recipient

Special Instructions

Bequest 3

Item

Intended Recipient

Special Instructions

Bequest 4

Item

Intended Recipient

Special Instructions

Bequest 5

Item

Intended Recipient

Special Instructions

Bequest 6

Item

Intended Recipient

Special Instructions

Bequest 7

Item

Intended Recipient

Special Instructions

Bequest 8

Item

Intended Recipient

Special Instructions

Bequest 9

Item

Intended Recipient

Special Instructions

Bequest 10

Item

Intended Recipient

Special Instructions

Bequest 11

Item

Intended Recipient

Special Instructions

Bequest 12

Item

Intended Recipient

Special Instructions

Bequest 13

Item

Intended Recipient

Special Instructions

Bequest 14

Item

Intended Recipient

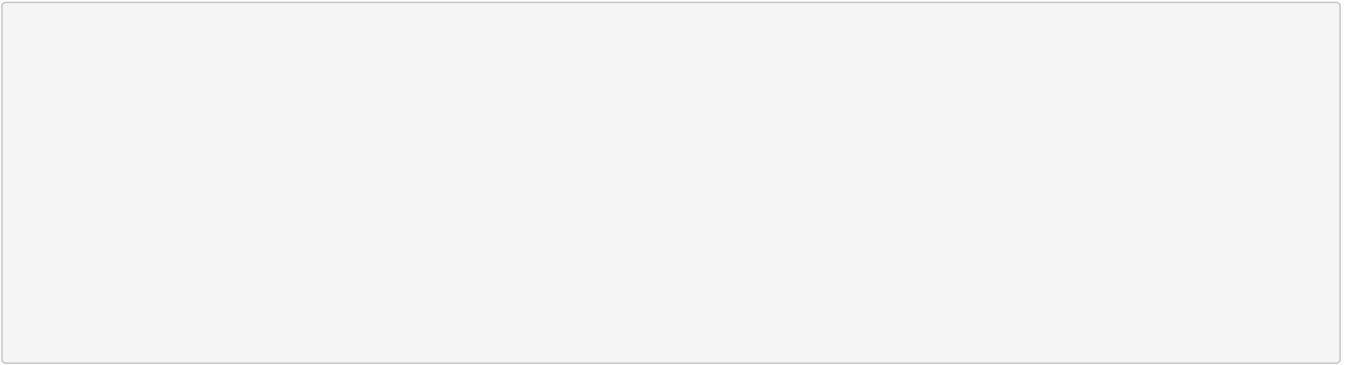
Special Instructions

Bequest 15

Item

Intended Recipient

Special Instructions



Digital Life

Password Manager

Master Password Location

Phone Password Hint

Computer Password Hint

Digital Legacy Contact

Phone

Email

Platforms They Manage

Photo / File Storage Instructions

Notes

Email / Online Account 1

Provider

Email Address / Username

Recovery Info

Notes

Email / Online Account 2

Provider

Email Address / Username

Recovery Info

Notes

Email / Online Account 3

Provider

Email Address / Username

Recovery Info

Notes

Email / Online Account 4

Provider

Email Address / Username

Recovery Info

Notes

Email / Online Account 5

Provider

Email Address / Username

Recovery Info

Notes

Email / Online Account 6

Provider

Email Address / Username

Recovery Info

Notes

Email / Online Account 7

Provider

Email Address / Username

Recovery Info

Notes

Email / Online Account 8

Provider

Email Address / Username

Recovery Info

Notes

Email / Online Account 9

Provider

Email Address / Username

Recovery Info

Notes

Email / Online Account 10

Provider

Email Address / Username

Recovery Info

Notes

Email / Online Account 11

Provider

Email Address / Username

Recovery Info

Notes

Email / Online Account 12

Provider

Email Address / Username

Recovery Info

Notes

Email / Online Account 13

Provider

Email Address / Username

Recovery Info

Notes

Email / Online Account 14

Provider

Email Address / Username

Recovery Info

Notes

Email / Online Account 15

Provider

Email Address / Username

Recovery Info

Notes

Internet Service 1

ISP Name

Account Number

WiFi Network Name

WiFi Password Location

Router Location

VPN Service

Internet Service 2

ISP Name

Account Number

WiFi Network Name

WiFi Password Location

Router Location

VPN Service

Internet Service 3

ISP Name

Account Number

WiFi Network Name

WiFi Password Location

Router Location

VPN Service

Internet Service 4

ISP Name

Account Number

WiFi Network Name

WiFi Password Location

Router Location

VPN Service

Internet Service 5

ISP Name

Account Number

WiFi Network Name

WiFi Password Location

Router Location

VPN Service

Security System 1

Type

Service Name

Account #

Access Hint

Monitoring Phone

MFA Backup Codes Location

Security System 2

Type

Service Name

Account #

Access Hint

Monitoring Phone

MFA Backup Codes Location

Security System 3

Type

Service Name

Account #

Access Hint

Monitoring Phone

MFA Backup Codes Location

Security System 4

Type

Service Name

Account #

Access Hint

Monitoring Phone

MFA Backup Codes Location

Security System 5

Type

Service Name

Account #

Access Hint

Monitoring Phone

MFA Backup Codes Location

Digital Asset 1

Type

Name

Registrar / Host

Domains

Login Hint

Digital Asset 2

Type	Name	Registrar / Host
<input type="text"/>	<input type="text"/>	<input type="text"/>

Domains	Login Hint
<input type="text"/>	<input type="text"/>

Digital Asset 3

Type	Name	Registrar / Host
<input type="text"/>	<input type="text"/>	<input type="text"/>

Domains	Login Hint
<input type="text"/>	<input type="text"/>

Digital Asset 4

Type	Name	Registrar / Host
<input type="text"/>	<input type="text"/>	<input type="text"/>

Domains	Login Hint
<input type="text"/>	<input type="text"/>

Digital Asset 5

Type	Name	Registrar / Host
<input type="text"/>	<input type="text"/>	<input type="text"/>

Domains	Login Hint
<input type="text"/>	<input type="text"/>

Cloud Storage 1

Service Name	Login Hint
<input type="text"/>	<input type="text"/>

Encrypted Archive Location

Decryption / Access Instructions

Cloud Storage 2

Service Name

Login Hint

Encrypted Archive Location

Decryption / Access Instructions

Cloud Storage 3

Service Name

Login Hint

Encrypted Archive Location

Decryption / Access Instructions

Cloud Storage 4

Service Name

Login Hint

Encrypted Archive Location

Decryption / Access Instructions

Cloud Storage 5

Service Name

Login Hint

Encrypted Archive Location

Decryption / Access Instructions

Social Media Accounts

Account 1

Platform

Username

Memorial Instructions

Account 2

Platform

Username

Memorial Instructions

Account 3

Platform

Username

Memorial Instructions

Account 4

Platform

Username

Memorial Instructions

Account 5

Platform

Username

Memorial Instructions

Account 6

Platform

Username

Memorial Instructions

Account 7

Platform

Username

Memorial Instructions

Account 8

Platform

Username

Memorial Instructions

Account 9

Platform

Username

Memorial Instructions

Account 10

Platform

Username

Memorial Instructions

Data Backup Plans

Backup Plan 1

Type

Location

Description

How to Restore

Backup Plan 2

Type

Location

Description

How to Restore

Backup Plan 3

Type

Location

Description

How to Restore

Backup Plan 4

Type

Location

Description

How to Restore

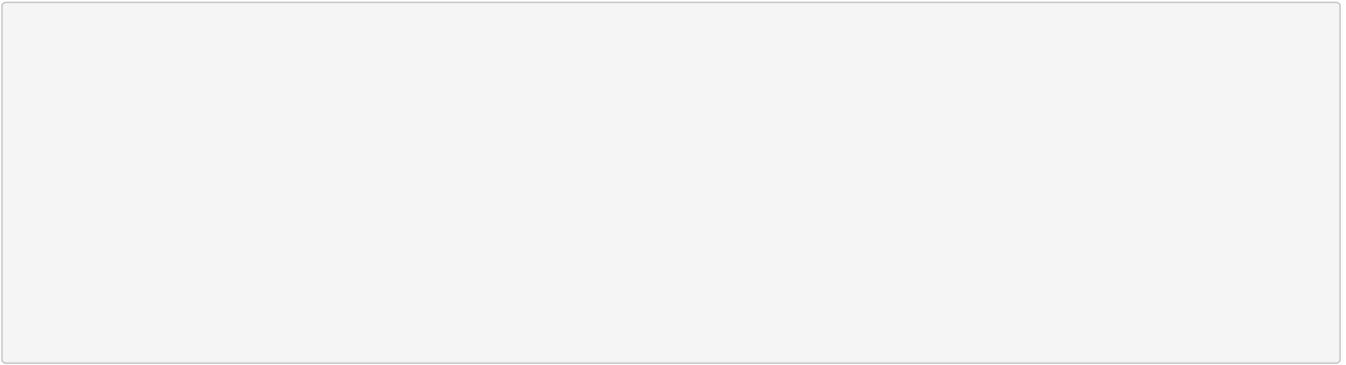
Backup Plan 5

Type

Location

Description

How to Restore



Subscriptions

Subscription 1

Name

Type

Cancellation Instructions

Subscription 2

Name

Type

Cancellation Instructions

Subscription 3

Name

Type

Cancellation Instructions

Subscription 4

Name

Type

Cancellation Instructions

Subscription 5

Name

Type

Cancellation Instructions

Subscription 6

Name

Type

Cancellation Instructions

Subscription 7

Name

Type

Cancellation Instructions

Subscription 8

Name

Type

Cancellation Instructions

Subscription 9

Name

Type

Cancellation Instructions

Subscription 10

Name

Type

Cancellation Instructions

Subscription 11

Name

Type

Cancellation Instructions

Subscription 12

Name

Type

Cancellation Instructions

Subscription 13

Name

Type

Cancellation Instructions

Subscription 14

Name

Type

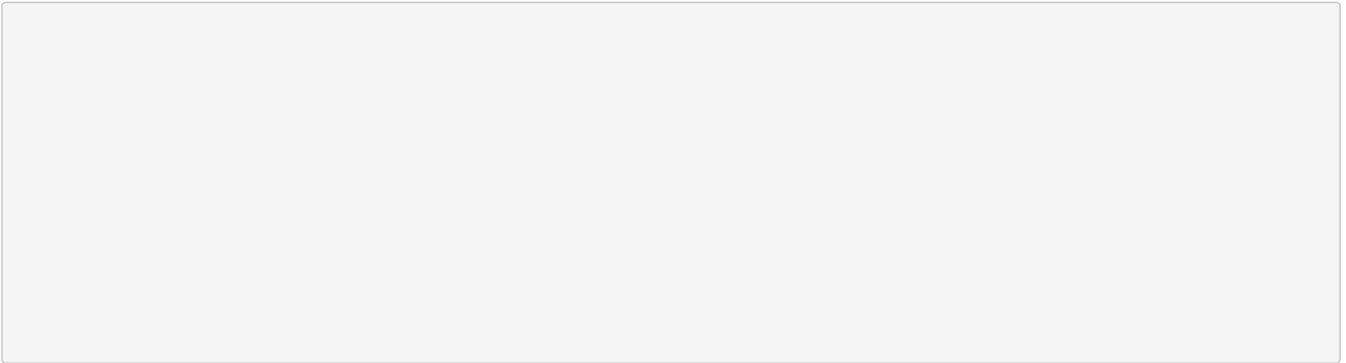
Cancellation Instructions

Subscription 15

Name

Type

Cancellation Instructions



Funeral & Legacy

Funeral Preference

Funeral Home

Phone

Ceremony Details

Burial Plot Location

Music/Readings

Obituary Draft

[Empty text area for Obituary Draft]

Pallbearers

[Empty text area for Pallbearers]

Eulogy Notes / Speakers

[Empty text area for Eulogy Notes / Speakers]

Post-Funeral Gathering Instructions

[Empty text area for Post-Funeral Gathering Instructions]

Memorial / Anniversary Wishes

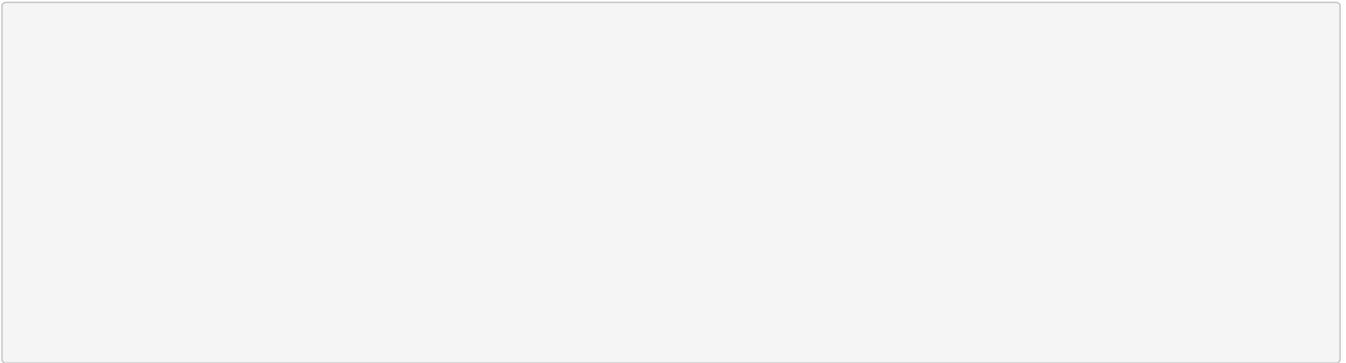
Flowers vs Donations Preference

Body Donation Preferences

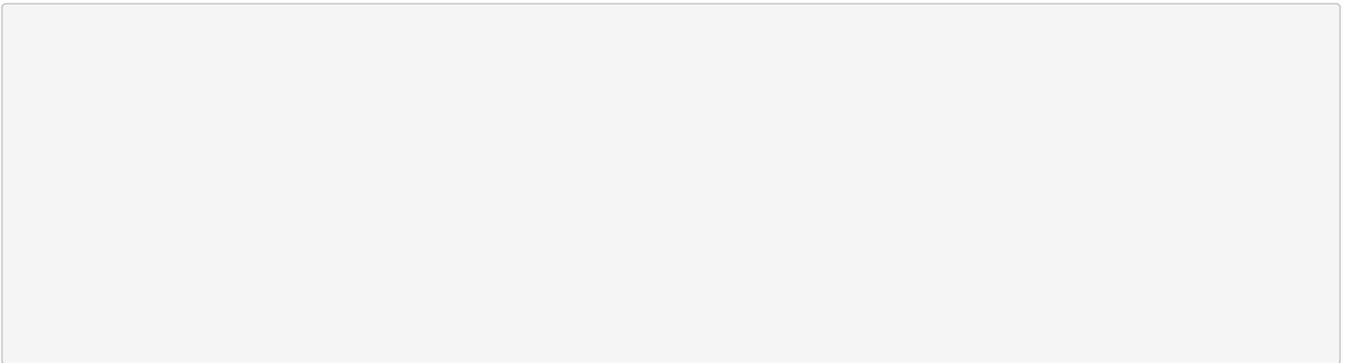
Green Burial Preferences

Letters for After Death

Videos for After Death



Items to Destroy



Charitable Giving

Commitment 1

Organization

Amount

Frequency

Contact Name

Contact Phone

Notes

Commitment 2

Organization

Amount

Frequency

Contact Name

Contact Phone

Notes

Commitment 3

Organization

Amount

Frequency

Contact Name

Contact Phone

Notes

Commitment 4

Organization

Amount

Frequency

Contact Name

Contact Phone

Notes

Commitment 5

Organization

Amount

Frequency

Contact Name

Contact Phone

Notes

Commitment 6

Organization

Amount

Frequency

Contact Name

Contact Phone

Notes

Commitment 7

Organization

Amount

Frequency

Contact Name

Contact Phone

Notes

Commitment 8

Organization

Amount

Frequency

Contact Name

Contact Phone

Notes

Commitment 9

Organization

Amount

Frequency

Contact Name

Contact Phone

Notes

Commitment 10

Organization

Amount

Frequency

Contact Name

Contact Phone

Notes

Faith & Religion

Religious Affiliation

Congregation Name

Congregation Address

Congregation Phone

Member Number

Clergy Name

Clergy Phone

Clergy Email

Practices & Observances

End-of-Life Rites

Instructions for Children

Spiritual Wishes

Sacred Texts Location

Religious Documents Location

Education & Certifications

School 1

School Name	Degree	Graduation Date
<input type="text"/>	<input type="text"/>	<input type="text"/>
GPA	Major/Minor	
<input type="text"/>	<input type="text"/>	

School 2

School Name	Degree	Graduation Date
<input type="text"/>	<input type="text"/>	<input type="text"/>
GPA	Major/Minor	
<input type="text"/>	<input type="text"/>	

School 3

School Name	Degree	Graduation Date
<input type="text"/>	<input type="text"/>	<input type="text"/>
GPA	Major/Minor	
<input type="text"/>	<input type="text"/>	

School 4

School Name	Degree	Graduation Date
<input type="text"/>	<input type="text"/>	<input type="text"/>
GPA	Major/Minor	
<input type="text"/>	<input type="text"/>	

School 5

School Name	Degree	Graduation Date
<input type="text"/>	<input type="text"/>	<input type="text"/>
GPA	Major/Minor	
<input type="text"/>	<input type="text"/>	

Professional License 1

License Name	Issuing Body
<input type="text"/>	<input type="text"/>
License #	Expiration
<input type="text"/>	<input type="text"/>

Professional License 2

License Name

Issuing Body

License #

Expiration

Professional License 3

License Name

Issuing Body

License #

Expiration

Professional License 4

License Name

Issuing Body

License #

Expiration

Professional License 5

License Name

Issuing Body

License #

Expiration

Transcripts Location

Ancestry & Personal History

Family Tree Notes

Heritage / Ethnic Background

Personal History / Life Story

Letters to Loved Ones

Pets

Pet 1

Name

Species

Breed

Vet Name

Vet Phone

Feeding Schedule

Special Instructions

Pet 2

Name

Species

Breed

Vet Name

Vet Phone

Feeding Schedule

Special Instructions

Pet 3

Name

Species

Breed

Vet Name

Vet Phone

Feeding Schedule

Special Instructions

Pet 4

Name

Species

Breed

Vet Name

Vet Phone

Feeding Schedule

Special Instructions

Pet 5

Name

Species

Breed

Vet Name

Vet Phone

Feeding Schedule

Empty rectangular box for Feeding Schedule.

Special Instructions

Empty rectangular box for Special Instructions.

Emergency Preparedness

Meeting Location 1

Meeting Location 2

Water Shutoff Location

Gas Shutoff Location

Fire Extinguisher Locations

Smoke Detector Notes

Emergency Water

Emergency Food

Emergency Cash

Emergency Grab List

Rewards & Loyalty

Program 1

Program Name

Member #

Balance

Notes

Program 2

Program Name

Member #

Balance

Notes

Program 3

Program Name

Member #

Balance

Notes

Program 4

Program Name

Member #

Balance

Notes

Program 5

Program Name

Member #

Balance

Notes

Program 6

Program Name

Member #

Balance

Notes

Program 7

Program Name

Member #

Balance

Notes

Program 8

Program Name

Member #

Balance

Notes

Program 9

Program Name

Member #

Balance

Notes

Program 10

Program Name

Member #

Balance

Notes

Memberships

Membership 1

Name

Type

Member #

Notes

Membership 2

Name

Type

Member #

Notes

Membership 3

Name

Type

Member #

Notes

Membership 4

Name

Type

Member #

Notes

Membership 5

Name

Type

Member #

Notes

Membership 6

Name

Type

Member #

Notes

Membership 7

Name

Type

Member #

Notes

Membership 8

Name

Type

Member #

Notes

Membership 9

Name

Type

Member #

Notes

Membership 10

Name

Type

Member #

Notes

Membership 11

Name

Type

Member #

Notes

Membership 12

Name

Type

Member #

Notes

Membership 13

Name

Type

Member #

Notes

Membership 14

Name

Type

Member #

Notes

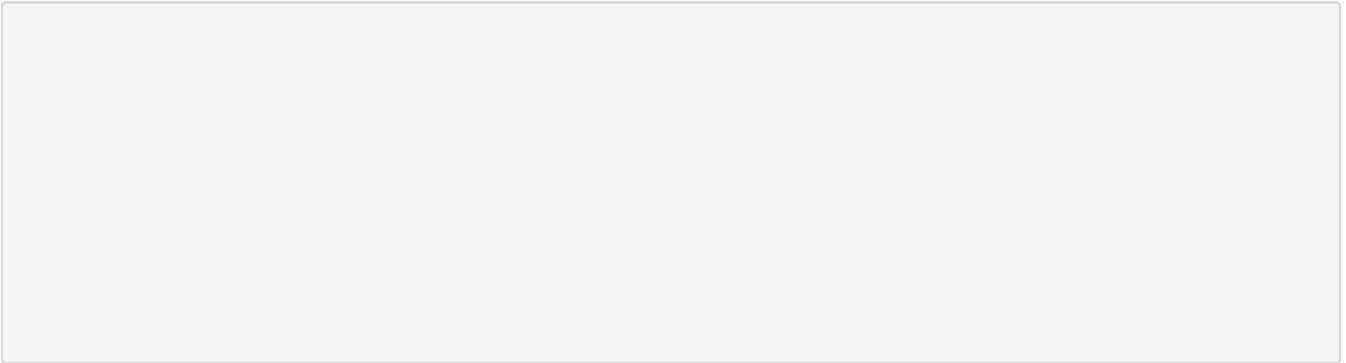
Membership 15

Name

Type

Member #

Notes



Physical Keys & Access

Key 1

Key Type	Description	For Property
<input type="text"/>	<input type="text"/>	<input type="text"/>
Primary Location	Copies Held By	
<input type="text"/>	<input type="text"/>	

Key 2

Key Type	Description	For Property
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Primary Location	Copies Held By	
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Key 3

Key Type	Description	For Property
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Primary Location	Copies Held By	
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Key 4

Key Type	Description	For Property
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Primary Location	Copies Held By	
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Key 5

Key Type	Description	For Property
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Primary Location	Copies Held By	
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Key 6

Key Type	Description	For Property
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Primary Location	Copies Held By	
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Key 7

Key Type	Description	For Property
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Primary Location	Copies Held By
<input type="text"/>	<input type="text"/>

Key 8

Key Type	Description	For Property
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Primary Location	Copies Held By
<input type="text"/>	<input type="text"/>

Key 9

Key Type	Description	For Property
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Primary Location	Copies Held By
<input type="text"/>	<input type="text"/>

Key 10

Key Type	Description	For Property
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Primary Location	Copies Held By
<input type="text"/>	<input type="text"/>

Maintenance Calendar

Item 1

Category

Item Name

Frequency

Last Completed

Next Due

Service Provider

Notes

Item 2

Category

Item Name

Frequency

Last Completed

Next Due

Service Provider

Notes

Item 3

Category

Item Name

Frequency

Last Completed

Next Due

Service Provider

Notes

Item 4

Category

Item Name

Frequency

Last Completed

Next Due

Service Provider

Notes

Item 5

Category

Item Name

Frequency

Last Completed

Next Due

Service Provider

Notes

Item 6

Category

Item Name

Frequency

Last Completed

Next Due

Service Provider

Notes

Item 7

Category

Item Name

Frequency

Last Completed

Next Due

Service Provider

Notes

Item 8

Category

Item Name

Frequency

Last Completed

Next Due

Service Provider

Notes

Item 9

Category

Item Name

Frequency

Last Completed

Next Due

Service Provider

Notes

Item 10

Category

Item Name

Frequency

Last Completed

Next Due

Service Provider

Notes

Item 11

Category

Item Name

Frequency

Last Completed

Next Due

Service Provider

Notes

Item 12

Category

Item Name

Frequency

Last Completed

Next Due

Service Provider

Notes

Item 13

Category

Item Name

Frequency

Last Completed

Next Due

Service Provider

Notes

Item 14

Category

Item Name

Frequency

Last Completed

Next Due

Service Provider

Notes

Item 15

Category

Item Name

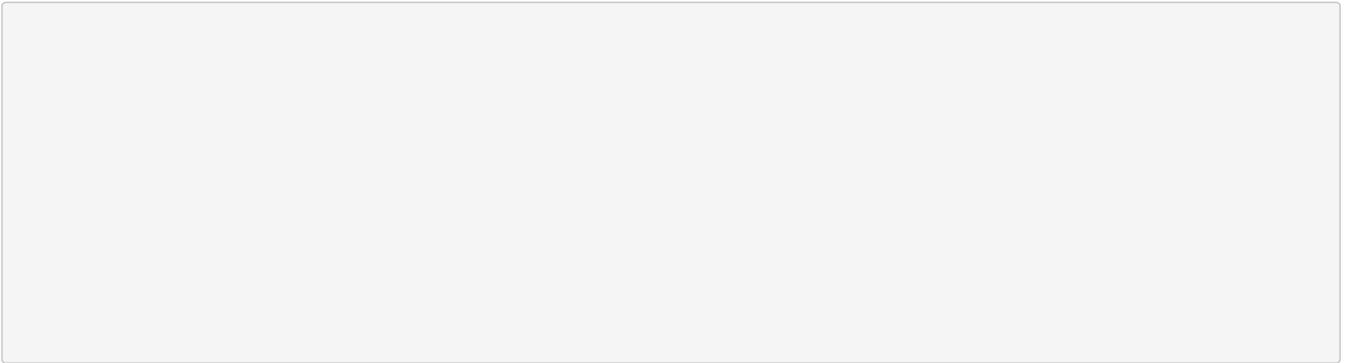
Frequency

Last Completed

Next Due

Service Provider

Notes



Custom Fields

Field 1

Label

Value

Field 2

Label

Value

Field 3

Label

Value

Field 4

Label

Value

Field 5

Label

Value

Field 6

Label

Value

Field 7

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Field 8

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Label

Value

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