

CHECK LIST – Where to Find Stuff When I’m No Longer Here

DATE

When completed, this document can be used as a checklist or to do list for your executor / digital executor so that your estate can more easily be taken care of.

Think about your executor, digital executor, family, etc. having to find the below items after you are gone. Being able to find the documents, etc. will make it easier to finalize things.

- Go into the detail on everything as if you are the person looking for the document, etc.
- *Using this Word table*, input your information in the categories that apply to you, delete those that don’t, and add more as necessary.
- You need to keep the document updated when there are changes to the information.
- Make sure the right people know where to find the document.

Where to save this document:

- On your hard drive
- To a flash drive
 - Create one each for the appropriate people.
- Encrypt the file on your hard drive or flash drive and give them the password.
- *I will print the document after I have completed and/or revised it and include it in the binder that includes my important documents. JT*
- Don’t forget to keep your document updated 😊
- Use a password manager for all of your online presence – account / login / username / password, etc.
- Give master password to digital executor and/or executor.

Note to Family Members:

- You may want to start with a note to your relative(s) as to why you have created this document. Be sure to change the date each time you update the information.

CATEGORY	QUESTIONS	ANSWERS	COMMENTS
Valuable Papers			
	Where do you keep your valuable papers?		
	Safe deposit box – where?		
	Where is the key?		
	Fireproof safe? (how do they get access?)		
	File cabinet?		
	Photographs and photo albums		
Social Security Number			
	Where is your Social Security card		
	Needed by		
	Funeral Home		
	Armed Forces for benefits		
Birth Certificate			
	Location of your birth certificate (official copy) and photocopies. More than one copy may be needed.		
Proof of Identity and Relationship(s) Where are they located			
	Driver License		
	Passport		
	Armed Forces discharge papers		
	Marriage certificate(s)		
	Divorce certificate(s)		
	Prenuptial agreement(s)		
	Divorce settlement(s)		
Will / Living Trust			
	Where Is the original copy of your Will/Living Trust? Do you have more than one original copy? (Recommended) Where are they?		
	Who are your witnesses and how to locate the witnesses?		
	Bank accounts associated with the Trust		

Advance Health Care Directive			
	Where is it?		
	Does your doctor / medical plan have a copy?		
	Does your local hospital have a copy?		
	Do you have a notarized copy you take when you travel?		
Power of Attorney			
	Name of person appointed to Power of Attorney		
	Power of Attorney documentation		
	Name of attorney or law firm that created your Advance HC Directive, Power of Attorney, Trusts, and Will or Living Trust		
	Contact information (phone / e-mail)		
Funeral Arrangements			
	If you have made funeral arrangements what are the details?		
	Where is the information?		
Burial Plot			
	Have you purchased a cemetery lot?		
	Plot details		
	Location of deed		
Obituary			
	Have you written your obituary?		
	Location?		
Health Insurance Information			
	Name of Plan		
	Plan Number		
	Phone Number		
	Primary Care MD		
	How does the plan want to be notified of a member's death		
Automatically Renewing Medications			
	Name of medication(s)		
	Name of pharmacy		
	Contact information		
	Name of doctor who prescribed medication(s)		
	Contact information		

Insurance Policies			
	Life insurance		
	Beneficiaries		
	Car insurance		
	Home insurance		
	Other insurance policies (theft, fire, earthquake, etc.)		
	List each insurance policy and policy number		
	List the company which underwrites it		
	Phone number and person to contact		
	Where are the original policies? (If you don't know, maybe you should call the company and ask for a duplicate policy.)		
Bank Account(s)			
	What bank accounts do you have?		
	Checking		
	Savings		
	Debit Card (s)		
	Certificates of Deposit (CDs)		
	Name of bank, contact and location details for all accounts		
Are you a treasurer for an organization where you control its money?			
	Name or organization(s)		
	Contact information		
	Who should those funds go to?		
	Account number(s)		
	Where are the bank statements?		
Organizations			
	Are there organizations that need to be notified that you are no longer here?		
	Name(s)		
	Contact information		
Tax Returns			
	Most recent W-2 forms / Social Security information received in January		
	Income tax returns for current and previous year, including 1040 variations and 1099s, if applicable		

Pension Plans and Retirement Benefit Information			
	Do you receive any retirement checks?		
	Will they continue to be paid to beneficiaries?		
	Who pays them?		
	Who do you contact?		
	401(k) or 403(b)		
	Roth IRAs		
Investment Portfolio			
	Company		
	Agent name / Contact information		
	Account number(s)		
	Do you keep track of them in your computer?		
	What is the file name?		
	Where are the monthly statements?		
	Stocks		
	Bonds		
	Mutual funds		
Debts			
	What debts do you have?		
	Amount?		
	Name / contact information		
	Where is the paperwork		
Credit Cards			
	Card number(s)		
	Expiration date(s)		
	Recent account statement(s)		
	Login and password information for online account management (password program, etc.)		
Store Charge Cards			
	Card number(s)		
	Expiration date(s)		
	Recent account statement(s)		
	Login and password information for online account management (password program, etc.)		

Gasoline Credit Cards			
	Card number(s)		
	Expiration date(s)		
	Recent account statement(s)		
	Login and password information for online account management (password program, etc.)		
Property			
	Where is the deed?		
	Is it paid off?		
	Mortgage Company		
	Loan Number		
	Contact information		
	Has your property been surveyed?		
	Where is the survey?		
Other real estate			
	Same information as above		
House and other keys			
	What keys do you carry with you?		
	Where are they located?		
	Where do you have any extra house keys?		
	What do they fit?		
	Where are they located?		
More Keys			
	Do you possess keys to anyone else's house?		
	Where do you keep them?		
	Who should get them?		
Combination Lock			
	What is the combination to any locks you have?		
	Do you have padlocks?		
	Where are the keys?		
Household Utilities Account/Phone Number			
	Electricity		
	Gas		
	Water		
	Phone		
	Cable		
	Internet		
	Gardener		

Car			
	Where are the registration papers for the car(s)?		
	Is there a car loan?		
	Where is the loan agreement(s)?		
	Insurance company		
	Name of agent		
	Contact information		
Pets			
	Discuss the disposition of any pets you may have.		
	Veterinarian		
	Contact information		
Post Office Box			
	Where is it?		
	Number?		
	Where is the key / combination?		
Tickets			
	If you have purchased season tickets to stage shows, basketball, football or hockey games, where are they located or information about them?		
Hidden Cash Money			
	Do you have cash hidden somewhere? (Wouldn't it be a shame if the old sofa was sold for \$50 and you had \$200 in cash hidden in it?)		
Papers for Family Members			
	If you have established file folders for specific family members to have – perhaps some collectables - where do you keep them?		
	Things you might like to see happen. (Remember these are not binding unless specifically mentioned in a valid will/living trust.		
ONLINE PRESENCE			
Create a list of your online accounts			
	Do you really need all of them?		
	Have you had some for a gazillion years and haven't used them for a long time?		
	Why not close them = one less thing for your digital asset executor to do		

Password Manager			
	Use a password manager program so all the account names, numbers, logins, passwords etc. are in the same location		
	<i>Give master password to Digital Asset Executor, Encrypted the file on your hard drive or flash drive</i>		
	<i>Do not include any logins, passwords in a will = public document</i>		
	Facebook		
	Website domain names		
	Twitter		
	Online banking accounts		
	LinkedIn		
	Automatic bill pay		
	Frequent Flyer cards		
	Credit cards		
	Loyalty programs		
	Cell phone		
	Computer(s)		
	Cloud storage External hard drive(s)		
	Photo storage		
	Flash drives		
	Online backup		
Make it easier for your digital executor....			
	Research how to close accounts		
	Create list of URLs on how to close accounts		
	Download the instructions		
	Close down e-mail accounts / phone last		
	<i>NOTE: Facebook, various companies, etc. might need to send a verification e-mail that your digital executor needs to respond to</i>		
Create an IRS account before the crooks do it for you	https://sa.www4.irs.gov/eauth/pub/login.jsp		
Create a Social Security account	http://www.ssa.gov/myaccount/		
Other Items that are applicable only to you	Think carefully as to your own situation; go into the detail you would on every subject if you were the person looking for some document or thing.		

