Estate Organizer

|  |  |
| --- | --- |
| **IDENTIFICATION** |  |
|  Name |  |
|  Address |  |
|  Phone #(s) |  |
|  Email(s) |  |
|  |  |
|  |  |
|  |  |
| **Important Documents** | If applicable, list where the document is located |
|  Social Security # |  |
|  Driver’s License # |  |
|  Passport # |  |
|  Important Papers | Located:  |
| Other: | These can include birth & marriage certificates, divorce papers, titles |
|  |  |
|  |  |
|  |  |
|  |  |
| **IMMEDIATE FAMILY MEMBERS, FRIENDS,** | Relationship & Contact Information |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **DOCTORS, LAWYER, ACCOUNTANT, ETC.** | Contact Information |
|  |  |
|  |  |
|  |  |
|  |  |
| **Health Issues, Prescriptions, etc.** |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **Do you have a WILL?** \_\_\_\_\_Yes \_\_\_\_\_ No | If you checked yes for this and any of the following, where is it located?  |
|  |  |
| **Advanced Directives** - |  |
| Living Will\_\_\_\_\_Yes \_\_\_\_\_No |  |
| Medical Power of Attorney\_\_\_\_\_Yes \_\_\_\_\_No |  |
|  Name: Contact Information: |  |
|  Name: |  |
|  Contact Information: |  |
| Do Not Resuscitate Order\_\_\_\_\_Yes \_\_\_\_\_No |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **FINANCIAL** |  |
| BANK(S) | Contact Information; List Checking & Savings Accounts, Lockboxes, CDs; |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| INVESTMENT COs. | Contact Information |
|  |  |
|  |  |
|  |  |
|  |  |
| CREDIT CARD(S) | Contact Information |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **DEBT** | MORTGAGE, AUTO, CREDIT CARD, BUSINESS, PERSONAL LOAN, ETC. |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **WORK STATUS** | Include income, amount, company |
| **Employed (Company & Income Sources)** | Company & Contact Information |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **Retired (Income Sources)** | Social Security, Annuities, Investment income, etc. |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **INSURANCES** | Life, Medical, Property, Auto, Medicare, Medicare Supplement, Long-term Disability, Other, etc. Policy #s, Plans, contact information |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **HOUSEHOLD DOCS** | Located where?  |
|  Tax Returns |  |
|  Pet Records |  |
|  Monthly Payments  Receipts |  |
|  Photos - Print |  |
|  Photos - Digital |  |
|  Family History |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **ELECTRONIC DEVICES & DIGITAL ACCESS** | Log-ins and/or passwords; or instructions on where to find them |
| Computer or Laptop |  |
|  Cell Phone |  |
| Tablet |  |
| House Security |  |
|  Email(s): |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| Social Media |  |
|  |  |
|  |  |
|  |  |
|  Other |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **Contracts, Subscriptions, Monthly Commitments** | Account Numbers, Contact information |
|  Electricity |  |
| City Utilities |  |
|  |  |
|  Phone |  |
|  Internet |  |
| Cable TV |  |
|  |  |
|  Other: | Anything you pay monthly payments for |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  **Church or Charities** |  |
|  |  |
|  |  |
|  |  |
| **FINAL INSTRUCTIONS** | Things to do immediately after I die |
| **Get Legal Pronouncement of Death** | If I’m in a hospital or nursing home with a doctor present; staff will take care of this. If I died at home, a medical professional needs to declare me dead. Call 911 and have me transported to an emergency room for the declaration before Morin me to a funeral home. If I was under hospice care, a hospice nurse can declare me dead. This is required before anything else can be done. |
| **Contact** |  |
| Immediate Family & Friends | Contact family & friends listed on page 1 & 2; they can get the word out. Also post on Social Media (see log-in under Electronic & Digital Access) |
| Others to Contact | Contact information |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **FINAL INSTRUCTIONS** |  |
| **Contact** |  |
|  **Family & Friends** | List & Contact Information Attached  |
|  |  |
|  **Notifications** | This includes things like doctors, lawyer, financial advisor, Social Security Adm., life insurance companies, banks or other financial institutions, etc. |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  **Where to Send Death**  **Certificates** | Normally, you need certified copies of the death certificate for transfer of ownership for each major asset such as house, autos, land, bank accounts, life insurance policies, credit agencies, veteran’s survivor benefits, annuities, etc. Some require certified copies, which can get expensive, so ask if a non-certified photocopy is allowed or if the company would return the certified copy to you so you could use it again.  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **Remains Instructions**  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **Funeral Service Instructions** |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **Final Resting Place** |  |
|  |  |
|  |  |
|  |  |
| **Cancel** Subscriptions, Services, credit cards, driver’s license, Social Media, email accounts etc. no longer needed | See pages \_\_\_\_\_\_\_\_ for contact information |
|  |  |
| **Probate Will** | At county or city probate court office. Probate court makes sure all debts are paid and remaining assets are distributed to the beneficiaries. |
|  |  |
|  |  |
| **ASSETS** | List Assets & Where Deeds, Titles, Promissory Notes/Loans Are Located |
|  **House,** including property tax records |  |
|  |  |
|  |  |
|  **Other Real Estate**  **Property** |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  **Vehicle Titles &**  **Registrations** | List Vehicles, RV, boat, etc.and Where Titles & Registrations Are Located |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  **Other Assets** |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

Notes: