

## 2 - Where to Find Stuff When I Am No Longer Here Green Valley Recreation Computer Club (AZ)

Think about your executor, digital executor, family, etc., having to find the below items after you are gone. Finding the documents, etc., will make it easier to finalize things. First, delete the items that don't pertain to you and add those that do. Then, make the same changes in the Word Table or Excel spreadsheet.

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Go into detail on everything as if you were the person looking for the document, etc.

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*Using the Word or Excel checklist*, input your information in the categories that apply to you, delete those that don't, and add those that do.

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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 your document:

- Save it on your hard drive – encrypt the file
- Save it to a password-encrypted flash drive
- Create one each for the appropriate people
- Give them the password
- Use a password manager for all of your online presence – account/login /username/password, etc.
- Include important information about the accounts in the Notes section
- Buy a new appliance, router, etc.? Put the information in your password manager: S/N, warranty/registration information.....
- Give the master password to your digital executor and/or executor.

**\*\*Customize this document to fit your needs. Adding or removing information in the Word table or Excel spreadsheet will be easier. You can use LibreOffice's Writer and Calc to open the documents OR Google's Docs and Sheets.**

*Thanks to Jerry Heath, Central Kentucky Computer Society, for starting this document.*

*Additional information was added by Judy Taylour, SCV Computer Club, Dr. Garry Sexton, Greater South Bay Users Group, and David Shulman, Westchester PCUG.*

### **Note to Family Members:**

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You may want to start with a note to your relative(s) as to why you have created this document. Then, change the date each time you update the information.<sup>2</sup>

### **Valuable Papers**

- Where do you keep your valuable papers?
- Safe deposit box – do you have one, where?
- Where is the key?
- o Some banks charge up to \$150 to open it
- Fireproof safe? (how do they get access?)

- File cabinet?
- Photographs and photo albums

### **Social Security Number**

- Where is it located
- Needed by
  - o Funeral Home
  - o Armed Forces for benefits
  - o If military, where is the Form DD214 (Report of Separation from the Armed Forces of the United States)

### **Birth Certificate**

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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
- Prenuptial agreement(s)
- Marriage certificate(s)
- Divorce certificate(s)
- Divorce settlement(s)

### **Will / Living Trust**

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Where is the original copy of your Will/Living Trust? Do you have more than one original copy? (Recommended) Where are they?

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Who are your witnesses, and how do you locate the witnesses? (If they are all deceased or not available, you may want to do a new Will/Living Trust)

- Bank accounts associated with the Trust
- Cryptocurrency account(s)

### **Advance Directive**

- Where is the original (notarized)
- Does your doctor / medical plan/hospital have a copy
- Does it include information on...
- Health Care Proxy
- Do Not Resuscitate (DNR)
- Do you have a notarized copy you take when you travel (might not meet the requirements of another state)<sup>3</sup>

### **Power of Attorney**

- Name of the person appointed to Power of Attorney
- Power of Attorney documentation

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Name of attorney or law firm that created your Advance Directive, Power of Attorney, Trusts, and Will or Living Trust

- Law firm contact information (phone/e-mail)

## **Funeral Arrangements**

- What are the details (burial or cremation)
- Where is the information
- Donating your organs
- Disposition of your body
- Donating your body to a medical school
  - Name, contact, etc.
- Disposition of your body

## **Burial Plot**

- Have you purchased a cemetery plot?
- Where?
- Location of deed

## **Obituary**

- Have you written your obituary?
- Location

## **Medical 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
- Name of pharmacy
- Contact information
- Name of doctor who prescribed medication
- Doctor contact information<sup>4</sup>

## **Insurance Policies**

- Life insurance
  - Beneficiaries
- Home Insurance
- Other insurance policies (theft, fire, earthquake, etc.)
  - List each insurance policy and policy number
  - List the company that underwrites it
  - Phone number and person to contact
  - Where are the original policies? (If you don't know, maybe you should contact the company and ask for a duplicate policy.)

## **Bank Account(s)**

- What bank accounts do you have?
  - Checking
  - Savings
  - Money Market
  - Certificates of Deposit (CDs)
  - Debit Card
- In what bank(s)
  - What are the account numbers?

Cryptocurrency account

o How to access

- Are you a treasurer for any club where you control someone else's money?

- Name of organization

- Who should the funds go to

- Contact Information

- Bank

- Account number(s)

- Where are bank statements

### **Tax Returns**

- Most recent W-2 forms / Social Security information received in January

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Income tax returns for the current and previous year, including 1040 variations and 1099s, if applicable

### **Investment Portfolio**

- Company

- Agent name

- Phone

- email

- Account number(s)

- Do you keep track of them on your computer?

- Where are the monthly reports?

- Stocks

- Bonds

- Mutual funds

### **Pension Plans and Retirement Benefit Information**

- Do you receive any retirement checks?

- Will they continue to be paid to beneficiaries?

- Who pays them?

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Who do you contact?

o 401(k) or 403(b)

o Roth IRAs

o Work pension plan

### **Unemployment Benefits**

- Report the death to the unemployment benefits office

- Ask if there are remaining funds on the card

- Are remaining funds part of the estate

- Can beneficiaries receive them

- Will the card be revoked

- Does the debit card need to be destroyed or returned

### **Debts**

- What debts do you have?

- To whom

- Where are the papers for them?

**Credit Charge 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**

- Name(s)
- Card number(s)
- Expiration date(s)
- Recent account statement(s)
- Login and password information for online account management (password program, etc.)

**Gasoline Credit Cards**

- Name(s)
- Card number(s)
- Expiration date(s)
- Recent account statement(s)
- Login and password information for online account management (password program, etc.)<sup>6</sup>

**Title or Deeds to Any Property**

- Where is the deed to the house?
- Is it paid off?
- Mortgage Company
- Contact information
- How much did you pay for the house, and when did you buy it?
- If renting, where is the rental agreement
- Where are the tax assessment papers?
- Has your property been surveyed?
- Where is the survey

**Other Real Estate**

- Do you own other property?
- Where?
- Answer the same questions found under house above

**House and Other Keys**

- Where do you keep extra house keys, if any?
- What keys do you carry with you?
- What do they fit?

**More Keys**

- Do you have keys to anyone else's house?
- Where do you keep them?
- Who should get them?

**Combination Lock**

- What is the combination of any locks you have?
- Do you have padlocks
- Where are the keys

## **Household Utilities**

- Electricity
- Gas
- Water
- Phone
- Cable
- Internet
- Gardener

## **Car**

- Where are the registration papers?
- Is there a car loan(s)?
- Copy of agreement(s)
- Car insurance
- Name of agent
- Contact information
- Disposition of car?
- Car lease
- Individual
- Co-signer
- Car Dealer
- Contact information
- Lease location

## **Pets**

- Discuss the disposition of any pets you may have
- Where do they go
- Veterinarian
- Contact information

## **Post Office Box**

- Do you have a PO Box?
- Number
- Where is the key
- Where is the contract

## **Hidden Cash Money**

- Do you have cash hidden somewhere? (Wouldn't it be a shame if the old sofa was sold for \$100 and you had \$200 in cash hidden in it?)

## **Tickets**

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If you have purchased season tickets to stage shows, basketball, football, or hockey games, where do you keep your tickets waiting for the time to use them?

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Gift cards?

## **Organizations**

- Do you belong to organizations that need to be notified?
- Name(s)
- Contact information

## **Papers for Family Members**

- If you have established file folders for specific family members to have – perhaps some collectibles -- where do you keep them

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Things you might like to see happen. (Remember, these are not binding unless specifically mentioned in a valid will/living trust.)

## **DNA Test Results**

- Have you designated a beneficiary for your DNA test results?

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Give your digital executor the right to gain control of your DNA wherever it is stored.

## **Online Presence / Email Accounts / Social Media....**

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Use a password manager program so all the account names, numbers, logins, passwords etc., are in the same location. Give the master password to Digital8 Asset Executor, encrypted file on your hard drive, flash drive, or notebook.

Create a list of 2FA codes (include in the password manager program).

- Do not include any logins or passwords in a will = public document

- Make it easier for your digital executor....

o Research how to close accounts

o Create a list of URLs

o Download instructions

- Close down email accounts and phone last

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Facebook, various companies, etc., might need to send a verification email that your digital executor needs to respond to

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Contact all three credit bureaus and add a free credit freeze to restrict access to your credit report

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Makes it more difficult for identity thieves to open new accounts in your name

[How To Reach a Human at Experian, TransUnion, and Equifax - Clark Howard](#)

- Create an IRS account before the crooks do it for you <http://bit.ly/1G8iFiv>

- <https://sa.www4.irs.gov/eauth/pub/login.jsp>

- Create a Social Security account

- <http://www.ssa.gov/myaccount/>

- **Do you really need all your online accounts?**

- **Have you had some for a gazillion years and not used them for a long time?**

- **Why not close them = one less thing for your digital asset executor to do**