

### 3 - CHECKLIST – Where to Find Stuff When I Am No Longer Here GVR-AZ, April 2, 2024

#### 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 be more easily managed.*

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.

- Go into 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 update the document when information changes. When you update it, save the document with the new date.
- Make sure the right people know where to find the document.

Where to save this document:

- On your hard drive
- On a flash drive
  - Create one each for the appropriate people.
- Encrypt the file on your hard drive or flash drive and give the appropriate people the password.
- Don't forget to keep your document updated 😊
- Use a password manager for your online presence – account / login / username / password, etc.
- Give the master password to your digital executor and executor.

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

- You may want to include a note regarding why you have created this document.

CATEGORY	QUESTIONS	ANSWERS	COMMENTS
<b>Valuable Papers</b>			
	Where do you keep your valuable papers?		
	Safe deposit box – where is it		
	Where is the key		
	Fireproof safe (how do they get access)		
	File cabinet		
	Photographs and photo albums		
<b>Social Security Number</b>			
	Where is your Social Security card		
	Needed by		
	Funeral Home		
	Armed Forces for Benefits (DD214)		
<b>Birth Certificate</b>			
	Location of your birth certificate (official copy) and photocopies. More than one copy may be needed.		
<b>Proof of Identity and Relationship(s) Where are they located</b>			
	Driver License		
	Passport		
	Armed Forces discharge papers (DD214)		
	Marriage certificate(s)		

	Divorce certificate(s)		
	Prenuptial agreement(s)		
	Divorce settlement(s)		
<b>Will / Living Trust</b>			
	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 do you locate the witnesses		
	Bank accounts associated with the Trust		
<b>Advance Health Care Directive</b>			
	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)		
	Donating your organs		
	Donating your body to a medical school		
	Do you have a notarized copy you take when you travel (it might not be valid in another state)		
<b>Power of Attorney</b>			
	Name of the person appointed with 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/email)		
<b>Funeral Arrangements</b>			
	Where is the detailed information		
<b>Burial Plot</b>			
	Have you purchased a cemetery lot?		
	Plot details		
	Location of deed		
<b>Obituary</b>			
	Have you written your obituary?		
	Location		
<b>Health Insurance Information</b>			
	Name of Plan		
	Plan Number		
	Phone Number		
	Primary Care MD		
	How does the plan want to be notified of a member's death?		
<b>Automatically Renewing Medications</b>			

	Name of medication(s)		
	Name of pharmacy		
	Contact information		
	Name of doctor who prescribed medication(s)		
	Contact information		
<b>Insurance Policies</b>			
	Life insurance		
	Beneficiaries		
	Car insurance		
	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, you should call the company and ask for a duplicate policy.)		
<b>Bank Account(s)</b>			
	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		
<b>Cryptocurrency</b>	Account information		
	How to access		
<b>Are you treasurer for an organization where you control its money</b>			
	Name of organization(s)		
	Contact information		
	Who should those funds go to		
	Account number(s)		
	Bank		
	Where are the bank statements		
<b>Organizations</b>			
	Are there organizations that need to be notified that you are no longer here		
	Name(s)		
	Contact information		
<b>Tax Returns</b>			
	Most recent W-2 forms / Social Security information received in January		
	Income tax returns for the current and previous year, including 1040 variations and 1099s, if applicable		

<b>Pension Plans and Retirement Benefit Information</b>			
	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		
	Work pension plan		
<b>Investment Portfolio</b>			
	Company		
	Agent name / Contact information		
	Account number(s)		
	Do you keep track of them on your		
	What is the file name?		
	Where are the monthly statements		
	Stocks		
	Bonds		
	Mutual funds		
<b>Unemployment Benefits</b>			
	Are you receiving benefits?		

	Report the death to the unemployment benefits office.		
	Ask if there are remaining funds on the card.		
	Will the card be revoked?		
	Are the remaining funds part of the estate		
	Can beneficiaries receive them?		
	Does the debit card need to be destroyed or returned		
<b>Debts</b>			
	What debts do you have		
	Amount		
	Name/contact information		
	Where is the paperwork		
<b>Credit Cards</b>			
	Card name(s)		
	Card number(s)		
	Expiration date(s)		
	Recent account statement(s)		
	Login and password information for online account management (password program, etc.)		
<b>Store Charge Cards</b>			
	Card name(s)		
	Card number(s)		



	Expiration date(s)		
	Recent account statement(s)		
	Login and password information for online account management (password program, etc.)		
<b>Gasoline Credit Cards</b>			
	Card name(s)		
	Card number(s)		
	Expiration date(s)		
	Recent account statement(s)		
	Login and password information for online account management (password program, etc.)		
<b>Title or Deeds to any Property</b>			
	Where is the deed		
	Is it paid off		
	Mortgage Company		
	Loan Number		
	Contact information		
	How much did you pay for the house? When did you buy it?		
	Where are the tax assessment papers		
	Has your property been surveyed		
	Where is the survey		

	If renting, where is the rental agreement		
<b>Other real estate</b>			
	Same information as above		
<b>House and other keys</b>			
	What keys do you carry with you?		
	Where are any extra house keys		
	What do they fit		
	Where are they located?		
<b>More Keys</b>			
	Do you have keys to anyone else's house?		
	Where do you keep them?		
	Who should get them		
<b>Combination Lock</b>			
	What is the combination of any locks you have		
	Do you have padlocks?		
	Where are the keys		
<b>Household Utilities Account/Phone Number</b>			
	Electricity		
	Gas		
	Water		
	Phone		

	Cable		
	Internet		
	Gardener		
<b>Car</b>			
	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		
	Disposition of car		
<b>Car Lease</b>	Individual		
	Co-signer		
	Car dealer		
	Contact information		
	Contract location		
<b>Pets</b>			
	Discuss the disposition of any pets you may have.		
	Where do they go		
	Veterinarian		
	Contact information		
<b>Post Office Box</b>			
	Where is it		

	Number		
	Where is the key/combination		
	Where is the contract		
<b>Tickets</b>			
	If you have purchased season tickets to stage shows, basketball, football, or hockey games, where are they located or information about them		
	Gift cards		
	Name/amount		
<b>Hidden Cash Money</b>			
	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)?		
<b>Papers for Family Members</b>			
	If you have established file folders for specific family members— perhaps some collectibles - where do you keep them?		
	Things you might like to happen. (Remember, these are not binding unless specifically mentioned in a valid will/living trust.)		
<b>DNA Test Results</b>			
	Name of company & contact information		

	What do you want done with them?		
<b>ONLINE PRESENCE: Create a list of your online accounts</b>			
	Do you 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		
<b>Password Manager</b>			
	Use a password manager program so all the account names, numbers, logins, passwords, etc., are in the same location.		
	<i>Give the master password to the Digital Asset Executor; encrypt the file on your hard drive or flash drive.</i>		
	<i>Do not include any login passwords in a will = public document.</i>		
<b>Make it easier for your digital executor....</b>			
	Research how to close accounts.		
	Create a list of URLs on how to close accounts.		
	Download the instructions		
	Close down email accounts/phone last.		

	<i>NOTE: Facebook, various companies, etc., might need to send a verification email that your digital executor needs to respond to</i>		
<b>Create an IRS account before the crooks do it for you</b>	: <a href="https://sa.www4.irs.gov/eauth/pub/login.jsp">https://sa.www4.irs.gov/eauth/pub/login.jsp</a>		
<b>Create a Social Security account</b>	<a href="http://www.ssa.gov/myaccount/">http://www.ssa.gov/myaccount/</a>		
<b>Other Items that apply only to you</b>	Think carefully about your situation; go into the detail you would on every subject if you were the person looking for some document or thing.		