

CHECKLIST – Where to Find Stuff When I am No Longer Here

Geeks On Tour, 7/24/22

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. 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 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
- 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 all of 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
Valuable Papers			
	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		
Social Security Number			
	Where is your Social Security card		
	Needed by		
	Funeral Home		
	Armed Forces for benefits (DD214)		
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 (DD214)		
	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 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)		
Power of Attorney			
	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)		
Funeral Arrangements			
	Where is the detailed 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, 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		
Cryptocurrency	Account information		
	How to access		

Are you treasurer for an organization where you control its money			
	Name of organization(s)		
	Contact information		
	Who should those funds go to		
	Account number(s)		
	Bank		
	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 the 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		
	Work pension plan		
Investment Portfolio			
	Company		
	Agent name / Contact information		
	Account number(s)		
	Do you keep track of them on your computer		
	What is the file name		

	Where are the monthly statements		
	Stocks		
	Bonds		
	Mutual funds		
Unemployment Benefits			
	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 remaining funds part of the estate		
	Can beneficiaries receive them		
	Does the debit card need to be destroyed or returned		
Debts			
	What debts do you have		
	Amount		
	Name / contact information		
	Where is the paperwork		
Credit Cards			
	Card name(s)		
	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 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			
	Card name(s)		
	Card number(s)		
	Expiration date(s)		
	Recent account statement(s)		
	Login and password information for online account management (password program, etc.)		
Title or Deeds to any Property			
	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		
Other real estate			
	Same information as above		
House and other keys			
	What keys do you carry with you		
	Where are any extra house keys		
	What do they fit		
	Where are they located		
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 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		
	Disposition of car		
Car Lease	Individual		
	Co-signer		
	Car dealer		
	Contact information		
	Contract location		
Pets			
	Discuss the disposition of any pets you may have.		
	Where do they go		
	Veterinarian		
	Contact information		
Post Office Box			
	Where is it		
	Number		

	Where is the key/combination		
	Where is the contract		
Tickets			
	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		
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– 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.)		
DNA Test Results			
	Name of company & contact information		
	What do you want done with them		
ONLINE PRESENCE Create a list of your online accounts			
	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		
Password Manager			
	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 Digital Asset Executor; encrypt the file on your hard drive or flash drive</i>		
	<i>Do not include any logins, passwords in a will = public document</i>		
Make it easier for your digital executor....			
	Research how to close accounts		
	Create a 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 apply only to you	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.		