4 - CHECK LIST - Where to Find Stuff When I'm 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 exe	
Think about your executor, family, etc. having to find the below items after you are g	
Go into the detail on everything as if you are the person looking for the documents,	
Input your information in the categories that apply to you, delete those that don't, an	
You need to keep the document updated when there are changes to the informatior	
Make sure the right people know where to find the document.	
Be sure to change the date each time you update and save the information.	
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 the appropriate people the	
Use a password manager for all of your online presence -- account / login / usernan	
Give master password to digital executor and/or executor.	
Note: You may want to include a note regarding why you have created this; do	
DATE	
CATEGORY	**QUESTIONS**
Valuable Papers	Where to you keep your valuable papers
	Safe deposit box - where is it located
	Where is the key
	Fireproof safe - how is it accessed
	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 might be required.

Proof of identity and relationships) Where are they located?	
	Driver License
	Passport
	Armed Forces discharge papers (DD214)
	Marriage certificate(s)
	Divorce certificates(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
	Who are your witnesses and how to locate them
	Bank account(s) associated with the Trust
Advance Directive	
	Where is the original (notarized)
	Does your doctor / medical plan / local hospital have a copy
	Does it include information on
	Health Care Proxy
	Do Not Resuscitate (DNR)
	Donating your organs
	Donating your body to medical school
	Do you have a notarized copy you take when you travel (might not be valid in another state)
Power of Attorney	
	Name of person appointed with Power of Attorney
	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 plot
	Location details
	Location of deed
Obituary	
	Have you written your obit
	Where is it
Medical Information	
	Name of plan

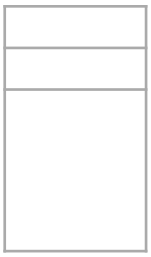
	Plan Number
	Phone Number
	Primary Care MD
	How does the plan want to be notified of a member's death
Automatically renewing medications	
	Name of medication(s)
	Name of pharmacy
	Contact information
	Name of doctor who prescribed the medications
	Contact information
Insurance Policies	
	Life insurance
	Beneficiaries
	Car insurance
	Home insurance
	Other insurance policies (theft, fire, earthquake, etc.)
	List each insurance policy and policy number
	Company that underwrites the policy
	Phone number and person to contact
	Where are the original policies (If you don't know, perhaps you should call the company and ask for a duplicate copy)
Bank Account(s)	
	What bank accounts do you have
	Certificates of Deposit (CDs)
	Checking
	Debit Card
	Money Market
	Savings
	Name on account, number, bank, location information, etc.
Cryptocurrency	Account information
	How to access
Are you the treasurer for an organization where you control its money?	
	Name of organization(s)
	Contact information
	Who should these 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 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
	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
	Name / contact info
	Amount?

	Where is the paperwork
Credit Cards	
	Card name(s)
	Card number(s)
	Expiration date(s)
	Recent account statement(s)
	Login/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/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/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
	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	
	Save info as above
Home 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 / padlocks	
	What is the combination to any locks you have
	Do you have padlocks
	Where are the keys
Household Utilities	
Account/Phone Number	Cable
	Electricity
	Gardener
	Gas
	Internet
	Phone
	Water
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(s)
Car Lease	
	Individual
	Co-signer
	Car dealer
	Contact information
Pets	Contract locoation
	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
Tickets	
	If you have purchased season tickets to stage shows, basketball, football, hockey, etc. games where are the tickets or information about the tickets?
	Gift cards - where are they
	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 hidden in it?)
Papers for Family Members	
	If you have established folders for specific family members (paper folders or computer file folders) where are they?
	Things you might like to happen. (Remember, these are not binding unless specifically mentioned in a valid will/living trust.)computer file folders) where are they?
DNA Test Results	
	Name of company & contact information
	What do you want done with your DNA
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 executor / digital executor to do
Password Manager	
	Use a password manager program so all the account name, numbers, logins, passwords, etc. are in the same location
	Give master password to executor / digital executor, encrypted file on your hard drive or flash drive
	Do not include any logins, passwords in a will = public document
Make it easier for your digital executor / executor	
	Research how to close accounts
	Create list of URLS about closing accounts
	Download the how-to document
	Close down email accounts / phone last
	NOTE: Facebook, various companies, etc. might need to send a verification email or call that your digital executor needs to respond to
Create an IRS account before the crooks do it	
	https://sa.www4.irs.gov/eauth/pub/login.jsp
Create a Social Security account	

	http://www.ssa.gov/myaccount/
Add other items to the list that are applicable 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.

ANSWERS	COMMENTS