1. Survivor Instructions
   1. Letter of Instruction
   2. Letter to Children
2. Important Contacts
   1. Professional Contacts
      1. Financial Advisor
      2. Estate Attorney
      3. CPA or Accountant
      4. Insurance Agent
      5. Business Relationships
      6. Primary Care Physician
      7. Dentist
   2. Personal Contacts
      1. Relatives
      2. Friends
3. Information Access
   1. Online accounts, passwords
   2. Online debits, billpay
   3. Safe Deposit boxes (identify authorized signer or co-owner)
   4. Keys, electronic codes
   5. Safe combination
4. Asset Statements
   1. Bank Accounts
   2. Brokerage Accounts
   3. Retirement Accounts (401k, IRA, Roth)
   4. EE Bonds or stock certificates
   5. Annuities
   6. Stock Options
5. Loan Statements
   1. Mortgage
   2. Auto Loans
   3. Credit Cards
   4. Home Equity
   5. Recreational vehicle, boat
6. Household Billing Statements
   1. Water/sewer
   2. Trash/recycling
   3. Natural Gas/Propane
   4. Electric
   5. Phone/Internet/Television
   6. Mobile Phone
   7. Newspaper/Magazines
   8. Online subscriptions
   9. Property tax
7. Education Planning
   1. Statements (529, Coverdell, Custodial)
   2. Education Reports
8. Insurance Inventory
   1. Life Insurance
   2. Disability Insurance
   3. Long Term Care Insurance
   4. Property/Casualty Insurance
   5. Umbrella Liability Insurance
   6. Video inventory of assets (USB flash drive or SD card)
9. Estate Planning
   1. Letter of Intent (sample)
   2. Will
   3. Trust
   4. Firearms Trust
   5. Documentation of expensive items and values (guns, jewelry)
   6. Funeral preplanning
10. Powers of Attorney
    1. Financial POA
    2. Healthcare POA
11. Family Legal
    1. Divorce decrees
    2. Powers of Attorney for children over 18
    3. Powers of Attorney for whom you are agent
12. Business Formations
    1. Limited Liability Companies
    2. Family Limited Partnerships
    3. Firearms Trusts
13. Healthcare
    1. Photocopies of Insurance Cards
    2. List Doctors, Prescriptions, Pharmacies
    3. List of allergies
    4. List of known medical conditions
14. Future Income
    1. Pension Benefit Estimates
    2. Social Security Benefit Estimates ([www.ssa.gov/myaccount](http://www.ssa.gov/myaccount))
15. Taxes
    1. Federal Tax Return
    2. State Tax Return
16. Personal History
17. Resources
    1. Recommended Reading
    2. Links to helpful websites
18. Important Documents
    1. Photocopies of Drivers’ Licenses
    2. Birth Certificates
    3. Social Security Cards
    4. Photos of Passports
    5. Names of all children, SSNs, DOBs, addresses, phone
    6. Deeds & Titles
       1. Home
       2. Auto
    7. Appraisals and Photos
       1. Jewelry
       2. Art
       3. Firearms