

Information Should You Become Incapacitated or Die

(copies of this form can be found at PrettyHandyGirl.com/important-questions-to-ask-loved-ones)

Date: _____

Dear _____,

Please know that I love you and hope I never need this information. Having the information in this document will make it easier for me to care for you should you be unable to communicate with me. I promise to store this information in a safe place and only refer to it if you become incapacitated or die. You can also put it in a sealed envelope with instructions to open if incapacitated for deceased.

Love,

1. LEGAL DOCUMENTS

Do you have a recent will*? _____ Date of Most Recent Version: _____

Attorney's Name: _____ Attorney's Contact Info: _____

Do you have Power-of-Attorney designated for financial matters*: _____

Do you have a Medical Power-of-Attorney*: _____

Who is the executor: _____

*If you don't, I highly recommend you create a will and designate a power of attorney.

2. MEDICAL INFO AND ADVANCED DIRECTIVES

Do you have an advanced medical directive (instructions should you be on life support): _____

If not, can you specify your desires if you are incapacitated, on life support, or considered terminal? _____

Do you have any medical issues a doctor should know about if you can't speak for yourself? _____

Is there any medication you take regularly that needs to be administered? _____

Who is your primary care physician? _____

Physician's contact info: _____

3. FINANCIALS AND INVESTMENTS

Financial institutions where you have accounts. If you don't feel comfortable giving log in and password information, please let me know where I can access this information if you are incapacitated or die.

Bank name: _____ Account number: _____

Contact info: _____

Login: _____ Password: _____

Bank name: _____ Account number: _____

Contact info: _____

Login: _____ Password: _____

Bank name: _____ Account number: _____

Contact info: _____

Login: _____ Password: _____

Bank name: _____ Account number: _____

Contact info: _____

Login: _____ Password: _____

Investment Accounts:

Company name: _____ Account number: _____

Contact info: _____

Login: _____ Password: _____

Company name: _____ Account number: _____

Contact info: _____

Login: _____ Password: _____

Company name: _____ Account number: _____

Contact info: _____

Login: _____ Password: _____

Are there any other investments I should be aware of? Private equity, direct company investments, crypto currency, offshore accounts, etc.? _____

If yes, please share institution and account numbers: _____

SAFETY DEPOSIT BOX OR SAFE?

Do you have a Safety Deposit Box? _____ Box#: _____

Bank or Location of Box: _____ Where is the Key? _____

Do you have a safe? _____ Location: _____

Combination: _____

Is it a standard lock or are there any specific tips for accessing the safe? _____

5.LIFE INSURANCE, PENSIONS, SOCIAL SECURITY:

Do you have any life insurance policies? _____

Policy Title: _____ Policy #: _____

Agent Contact Info: _____ Term Policy? _____ If so, expiration: _____

Policy Title: _____ Policy #: _____

Agent Contact Info: _____ Term Policy? _____ If so, expiration: _____

Policy Title: _____ Policy #: _____

Agent Contact Info: _____ Term Policy? _____ If so, expiration: _____

Pensions, 401K, IRA, or Other:

Company: _____ Account #: _____

Contact Info: _____

Company: _____ Account #: _____

Contact Info: _____

Company: _____ Account #: _____

Contact Info: _____

IMPORTANT DOCUMENTS:

In an emergency, where can I find your birth certificate, social security card, (if applicable) marriage certificate, divorce certificate, military discharge documents, and birth certificate? _____

What's your Social Security Number? _____

House:

Do you have a house title? _____ If yes, where is it stored? _____

If no, mortgage company: _____ Loan #: _____

Contact information: _____

Other Properties or Land:

Do you have a title? _____ If yes, where is it stored? _____

If no, loan company: _____ Loan #: _____

Contact information: _____

Vehicles:

Do you have your vehicle title(s): _____ If yes, where are they stored? _____

Car Make and Model: _____

If no title, auto loan bank: _____ Loan#: _____

Contact Info: _____

Car Make and Model: _____

If no title, auto loan bank: _____ Loan#: _____

Contact Info: _____

Car Make and Model: _____

If no title, auto loan bank: _____ Loan#: _____

Contact Info: _____

Recreational Vehicles:

Vehicle Make and Model: _____ Where is the title stored? _____

If no title, loan bank: _____ Loan#: _____

Contact Info: _____

Other Assets: _____

CREDIT CARD AND DEBTS

Credit card information:

Credit Card Name: _____ Account number: _____

Login: _____ Password: _____

Outstanding debts:

Any recurring expenses and payments?: _____

Institution: _____ Account #: _____

Contact Info: _____

Any recurring expenses and payments?: _____

Institution: _____ Account #: _____

Contact Info: _____

Any recurring expenses and payments?: _____

Institution: _____ Account #: _____

Contact Info: _____

PASSWORDS

Finally, and most importantly, do you have a file or somewhere that I can access your passwords in an emergency?

Or do you feel comfortable listing your current passwords here?

Computer: _____ Cell phone: _____

Email: _____ Other: _____

Do you use a secure single password software program that manages all your passwords like:

1Password, BitWarden, or Dashlane?

Program: _____ Username: _____ Password: _____

ADDITIONAL ARRANGEMENTS

What would you like or not like for your funeral service? _____

Have you pre-paid for a service with any funeral home or cremation society? _____

Do you have a charity where you'd like donations made in your honor? _____

Is there anything you want me to know after you are gone? _____

Any special requests for your possessions? Anything in particular you want to gift to someone? _____

Additional notes: _____
