



IN CASE ANYTHING HAPPENS TO ME

HERE'S A CHECKLIST

INITIAL ACTIONS WHEN THE TIME COMES

Fill in the blanks with any applicable information.

- **FIRST STEPS TO TAKE, WHEN READY**

- 1) Call _____ & _____. They will know the most about what to do.
- 2) Log in to the password manager using the credentials below.
 - _____
 - _____
- 3) Make sure you can get into our main financial accounts for continuity. _____
- 4) _____ has a copy of our estate planning documents, which are also located in the _____
- 5) {OTHER RELEVANT STEPS TO TAKE}
 - _____
 - _____
 - _____
 - _____

- **PASSWORDS AND LOGINS**

- Password Manager: _____
- USERNAME: _____
- MASTER PASSWORD: _____

- **CRITICAL DOCUMENTS & INSTRUCTIONS**

- Estate Plan: Basic summary (who the trustee(s) are, how assets flow, and any instructions for dependents)
 - _____
 - _____
 - _____

- Digital Copies: Indicate where scanned versions are stored (e.g., cloud storage folder link).

- _____

- Health Directives: Location of advance directives or living wills.

- _____

- Location of Social Security Card / Passport / Birth Certificate.

- _____

- **SUBSCRIPTIONS / MEMBERSHIPS**

- Streaming services:

- _____

- Memberships:

- _____

- Software/Cloud: iCloud, Dropbox, etc.

- _____

- Review Annual/Recurring charges: Use _____ statements or _____

- _____

- **DIGITAL ITEMS**

- Phone Carrier & PIN: _____

- Social Media Accounts: Whether to memorialize, delete, or preserve: _____

- Cloud Storage Services: (e.g., Google Drive, Dropbox, iCloud): _____

- Domain/Website Logins: _____

- **FINANCES**

- Brokerage accounts, IRAs, & 401Ks:

- _____

- Bank accounts:

- _____

- Credit cards:

- _____

- Crypto holdings:

- _____

- All accounts are linked to:

- _____

- 529 Plan is held at:

- _____

- Spreadsheet with balance sheet, cash flow, and transactions:

- _____

- Life insurance death benefit of \$ _____ through _____ {INSURANCE}

- Monthly / Annual Premiums: _____

- What you'll need to cash out the policy: _____

- Other investments

- Real estate: _____

- Private investments: _____

- Angel investments: _____

• **PROFESSIONAL TEAM CONTACT INFO**

- Primary financial advisor: _____
 - {PHONE} _____
 - {EMAIL ADDRESS} _____

- Estate planning attorney: _____
 - {PHONE} _____
 - {EMAIL ADDRESS} _____

- Personal attorney: _____
 - {PHONE} _____
 - {EMAIL ADDRESS} _____

- Life insurance agent: _____
 - {PHONE} _____
 - {EMAIL ADDRESS} _____

- Accountant/CPA: _____
 - {PHONE} _____
 - {EMAIL ADDRESS} _____

• **PET CARE** _____

- {VET CARE PROVIDER} _____

- Food: _____

- Medications: _____

- Dog sitter: _____

- Grooming: _____

• **MORTGAGE** _____

- {MORTGAGE COMPANY} _____

- Contact: _____

- Website: _____

- PITI = \$ _____ / mo.

• **HOMEOWNERS INSURANCE** _____

- {INSURANCE COMPANY} _____
- Contact: _____
- Website: _____

• **HOME SECURITY** _____

- {SECURITY PROVIDER} _____
- "Safe Word" = _____
- Code to turn off alarm = _____

• **LANDSCAPING** _____

- {COMPANY} _____
- Contact: _____
- Website: _____

• **PLUMBING** _____

- {COMPANY} _____
- Contact: _____
- Website: _____

• **PEST CONTROL** _____

- {COMPANY} _____
- Contact: _____
- Website: _____
- \$_____ /month

• **INTERNET** _____

- {COMPANY} _____
- Service: _____
- Website: _____

• **CABLE TV** _____

- {COMPANY} _____
- \$_____ /month

- **POWER** _____
 - {COMPANY} _____
 - Website: _____
 - \$_____ /month

- **GAS** _____
 - {COMPANY} _____
 - Website: _____
 - \$_____ /month

- **WATER** _____
 - {COMPANY} _____
 - Website: _____
 - \$_____ /month

- **SEWER / REFUSE** _____
 - {COMPANY} _____
 - Website: _____
 - \$_____ /month

- **HVAC** _____
 - {COMPANY} _____
 - Main Unit) Air Filter Last Replaced _____
 - Installed by _____
 - Warranty Info: _____

Reach out to Asset Strategy with any questions.

781-235-4426

www.assetstrategy.com

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