

Preplanning Check List... A Logical Option...

Important Contacts

- Emergency
- Work
- Doctor
- Financial/Accountant
- Insurance Agent
- Lawyer
- Other

Identification / Vital Documents

- Birth Certificate
- Passport
- Drivers License
- Citizenship Documents
- Other (Example: Club Memberships, State ID card)
- Social Security Card
- Marriage Certificate
- Armed Forces ID
- Divorce Decree

Bank Accounts / Mortgage / Loans

- Checking
- Money Market
- Savings
- Certificate of Deposit (Cds)
- Mortgage Info
- Loan Info
- Other

Investments / Pensions / Benefits

- Stocks
- Bonds
- Mutual Funds
- Military Benefits
- 401(k)
- Other (Example: Trust Fund)
- 403(b)
- IRA
- Roth IRA
- Pension (SEP/SARSEP)
- 529 / College Savings

Digital Accounts / Services

- Email
- Cloud Storage
- Health / Medical
- Money Management
- Social Media
- Travel / Ticketing
- Entertainment
- Food / Delivery
- Messaging
- Shopping
- Software
- Web Hosting

Legacy / After I'm Gone

- Funeral Preferences: Burial / Cremation / Donation
- Prepaid Arrangements & Contracts
- Obituary Information & Preferences
- Service Preferences: Readings / Songs / Pallbearers
- Memorial Location: Cemetery / Park / Other
- Memorial Selection: Color / Size / Style
- Memorial Story: Your Message to Others
- Gifts and Legacy Requests
- Executor
- Have the Talk of a Lifetime with Family and Friends

Official Documents

- Advance Health Care Directive(s)
- Trusts
- Insurance Policy(s)
- Power of Attorney
- Will
- Other

Insurance Info

- Life
- Home
- Funeral
- Health
- Renters
- Disability
- Car
- Long-Term Care
- Disaster
- Other

Credit Cards

- American Express
- Discover
- Mastercard
- Visa
- Other

Property Deeds / Titles

- Real Estate (owned)
- Real Estate (rented/leased)
- Boats
- Motor Vehicles
- Other

Household Utilities

- Electricity
- Water
- Gas
- Heating Oli
- Phone
- Cable
- Internet
- HVAC
- Septic
- Garbage
- Landscaping
- Cleaning Service
- Plumber
- Electrician
- Exterminator
- Home Automation
- Other

Miscellaneous Important Info

- Dependents
- Pets
- Other
- Subscriptions
- Collectibles



Please check out www.contactus@everplans.com to learn more about organizing and pre-planning to help reduce the financial and emotion burden on you loved ones.