

Checklist: Documents To Gather Before You Start Your Everplan

Getting Started

Here are some of the essential documents, accounts, and types of information you should organize and have at the ready before setting up an Everplan.

This checklist includes the following:

- Important Contacts
- Important & Official Documents
- Financial Accounts & Assets
- Home & Vehicle Information
- Identification
- Digital Estate & Asset Information

Remember

[Create an Everplan](#) to easily and securely update and share this vital info with the people you love and trust.

Important Contacts

- Emergency Name/Info: _____
- Work Name/Info: _____
- Doctor Name/Info: _____
- Financial/Accountant Name/Info: _____
- Insurance Agent Name/Info: _____
- Lawyer Name/Info: _____
- Other Name/Info: _____
- Other Name/Info: _____

OFFICIAL DOCUMENTS

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

IDENTIFICATION / VITAL DOCUMENTS

- Birth Certificate Driver's License
- Social Security Card Armed Forces ID / Discharge Papers
- Passport Citizenship Documentation
- Marriage Certificate Divorce Decree / Settlement Info
- Other (Example: Club Memberships, State ID card):



INSURANCE INFO

- Life Insurance
- Health Insurance
- Car Insurance
- Home Insurance
- Renters Insurance
- Long-Term Care Insurance
- Funeral Insurance
- Disability Insurance
- Disaster Insurance
- Other Insurance Policies (Example: Umbrella, Personal Articles):

BANK ACCOUNTS / MORTGAGE / LOANS

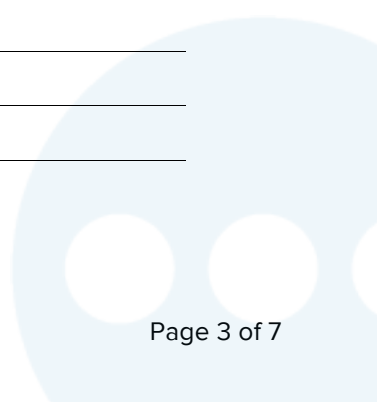
Have a recent account statement for each, location of related items (example: checkbooks, passbooks), and account/login and password for online management.

- Checking
- Savings
- Money Market
- Certificate Of Deposit (CDs)
- Mortgage Info
- Loan Info
- Other (Example: Debit Card, Promissory Note):

CREDIT CARDS

Have a recent account statement for each account and login/password for online management.

- American Express Last 4 Digits: _____ Exp. Date: _____
- Discover Last 4 Digits: _____ Exp. Date: _____
- Mastercard Last 4 Digits: _____ Exp. Date: _____
- Visa Last 4 Digits: _____ Exp. Date: _____
- Other:



INVESTMENTS / PENSIONS / BENEFITS

Have a recent statement for each account, as well as login info and password for online management.

- | | |
|---|--|
| <input type="checkbox"/> Stocks | <input type="checkbox"/> Bonds |
| <input type="checkbox"/> Mutual Funds | <input type="checkbox"/> Military Benefits |
| <input type="checkbox"/> 401(k) | <input type="checkbox"/> 403(b) |
| <input type="checkbox"/> IRA | <input type="checkbox"/> Roth IRA |
| <input type="checkbox"/> Pension (SEP / SARSEP) | <input type="checkbox"/> 529/College Savings |
| <input type="checkbox"/> Other (Example: Trust Fund, Specific Employee Benefits): | |
-
-

PROPERTY DEEDS / TITLES

- | | |
|--|--|
| <input type="checkbox"/> Real Estate (owned) | <input type="checkbox"/> Real Estate (rented/leased) |
| <input type="checkbox"/> Motor Vehicles | <input type="checkbox"/> Boats |
| <input type="checkbox"/> Other: | |
-

HOUSEHOLD UTILITIES

Have a recent account statement for each utility, as well as contact info if applicable.

- | | |
|--|---|
| <input type="checkbox"/> Electricity | <input type="checkbox"/> Gas |
| <input type="checkbox"/> Water | <input type="checkbox"/> Heating Oil |
| <input type="checkbox"/> Phone | <input type="checkbox"/> HVAC |
| <input type="checkbox"/> Cable | <input type="checkbox"/> Septic |
| <input type="checkbox"/> Internet | <input type="checkbox"/> Garbage |
| <input type="checkbox"/> Landscaping | <input type="checkbox"/> Cleaning Service |
| <input type="checkbox"/> Plumber | <input type="checkbox"/> Exterminator |
| <input type="checkbox"/> Electrician | <input type="checkbox"/> Home Automation |
| <input type="checkbox"/> Other (Example: Decorator, Pool Cleaner...) | |
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UNLOCKING ELECTRONICS / SECURITY

Ensure someone you trust knows how to access the following.

- Mobile Phone
- Computer(s)
- Tablet
- Home Security
- Password Manager
- Wi-Fi
- Other:

DIGITAL ACCOUNTS / SERVICES

Be prepared to identify all of the following digital accounts and services you use.

- Email
- Entertainment (Video / Music / Gaming)
- Cloud Storage
- Food / Delivery
- Health / Medical (medication)
- Messaging / Voice-over-IP
- Money Management
- Shopping
- Social Media
- Software Licenses
- Travel / Ticketing
- Web Hosting / Blogging
- Other (Example: Photography, Organization, Productivity...):

MISCELLANEOUS IMPORTANT INFO

- Dependents (Children, Special Needs)
- Magazine/Newspaper Subscriptions
- Pets (Vet, Diet, Guardian, Insurance)
- Collectibles (coins, stamps, memorabilia)
- Other:



LEGACY / AFTER I'M GONE

Things you should think about even if you haven't done any planning yet.

- Decide among: Burial / Cremation / Donation
- Funeral / Memorial Preferences
- Contracts / Prepaid Arrangements (Example: cemetery plot
- information) Obituary Preferences and info, which typically includes:

- o Date/place of birth: _____

- o Date/place of marriage: _____

- o Parent's names: _____

- o Education (schools/degrees): _____

- o Military/Public service (honors, awards, achievements):

- o Employment (titles, awards, achievements):

- o Organization affiliations (religious, cultural, civic):

- o Special accomplishments: _____

- o Hobbies and Interests: _____

- Letters For Family/Friends (list names of people you want to write a personal letter)

