



What Should Go in Your “When I Die” Folder?

Your people will need this **IMMEDIATELY**:

Basic info:

For Death Certificate:

- Your full name including any/all other names (maiden, nick, etc.)
- Your residence address
- Social Security number
- Date of death
- Date of birth
- Mother’s full name before marriage (maiden name)
- Mother’s city of birth
- Father’s full name
- Father’s city of birth
- Your occupation and the industry in which you worked
- Highest level of education you completed

- Phone: Phone #, password or PIN (and voicemail)
- Computer: Password, email address & password (include all email addresses)
 - Apple ID & password; Google ID & password
- Code to your safe and/or code or key location to safe deposit box
- Names & contact info:
 - Executor/Trustee
 - Attorney
 - Financial planner/advisor and/or accountant/CPA
 - Other immediate people that need to be contacted
- Info on dependents – kids, pets, elderly relatives and plans for their care.

Important papers:

- Birth Certificates (yours and your children)
- Proof of citizenship/legal status – passport, green card, cert of naturalization
- SS Cards
- Copy of DL
- Vehicle titles – car, boat, RV, motorcycle
- Property deeds/ownership/right of use docs – deed, lease
- Originals of Will/Trust (estate docs)
- Marriage and divorce papers

Primary Keys:

- Front door key to home/rental properties/offices
- Keys for vehicles – car, boat, camper, motorcycle

Active Financial Accounts:

- Bank accounts (include numbers, access info for online accounts)
- Payment accounts (include access info for online accounts)
 - Regular bills: How much? When? Paid where/how?
 - Automatic debits from bank account?



What Should Go in Your “When I Die” Folder?

Your people will need this **SOON**:

- NOK – names & contact info for parents, siblings, spouses (current & former), children, grandchildren
- Complete list of insurance policies (auto, life, long-term care, residential, health)
- Complete list of open accounts, particularly those that hold financial information (used to make purchases). Include money-moving apps like Venmo, Zelle, Paypal.
- Complete list of bank accounts, including savings, etc.
- Assets
 - Income sources: salary, Social Security, retirement income, side income, investment income
 - Investment portfolio
 - List of significant tangible assets
 - Investment properties including land
 - Valuables: jewelry, antiques, instruments, artwork
 - Licensed or registered property: firearms and other weapons, equipment
- Debts
 - Credit cards (major and retail)
 - Student debt
 - Medical debt
 - Personal debt
 - Don’t forget debts owed to you
- Storage Unit information
- Safe deposit box information
- Social media accounts
- Communities (church or volunteer organizations)
- Subscriptions, memberships and donations
- All info relevant to upkeep of primary residence:
 - Utility bills (how much, when and how paid)
 - Electric, gas, water, trash, sewer, lawn, solar, cable, internet, phone, etc.
 - Location of water and gas shutoff
 - Contact info for plumber, HVAC tech, electrician, handyman, sewer cleaning, lawn care, landscaping.
 - Warranties and manuals for repairs and upgrades.
 - Security codes
 - HOA info and fees



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Your people will need this **EVENTUALLY**:

- All info relevant to ownership of primary residence:
 - Mortgage lienholder
 - Mortgage statement
 - Statements for 2nd mortgages or HELOCs
 - Property tax statements
 - Closing or refi documents
 - Documents stating a lien or mortgage was paid off
 - Reverse mortgage information
 - Real estate agent contact info
- All keys:
 - Vehicles and attachments (like bike racks or roof boxes) – Cars, boats, campers
 - Mailbox or PO box
 - Bike locks
 - Sheds/outbuildings
 - All doors to home(s) – front, back, side
 - File cabinets, jewelry boxes, home safes
 - Storage units/lockers
- Longer list of friends and relatives to be notified of your death
- List of sentimental items – memorabilia, photographs, etc. Where they are and what is to be done with them.
- Intellectual property, if any. Writings, artwork, personal creations. Describe, location, and what is to be done with them.



What Should Go in Your “When I Die” Folder?

Your people will **LOVE** to know this:

- Personal history:
 - Education (where, when, transcripts, diplomas, achievements)
 - Career (employment history, awards, achievements)
 - Military service (memories, medals, achievements)
 - Medical records
 - Anything you think your descendants would want or need to know about you, including personal messages about your values, life lessons, hopes for their future, etc.
- Family stories: Blood and chosen family
 - Immigration/emigration circumstances
 - Hardships and triumphs in the family history.
 - Birth stories and favorite memories of your children.
 - Family gifts (resilience, musical talent, sense of humor) that are passed along.
- Your stories:
 - Different names you have had.
 - The story of your birth.
 - Places you lived.
 - Important friends, teachers, and influencers.
 - Your superstitions.
 - Your skills.
 - Your dreams, hopes, and aspirations.
 - What you were afraid of.
 - Miracles and mysteries you experienced.
 - Your spiritual/religious beliefs and practices.
 - Animal companions you've loved.
 - Places you've traveled.
 - Accomplishments you're proud of.
 - Things you've collected
- Your favorites:
 - Foods (include recipes.)
 - Books, Movies, Songs, Art
 - Holidays.
 - Vacations.
 - Sports.
 - Toys and Games
 - Plants, Trees, Stones
 - Weather.
 - Landscape.