



What You Need to Know...

**In the Event of My Death
or Disability**

Recommendations for the Access Information & Bills To Pay Forms Below:

It is recommended that you print out enough of the following sheets to provide information on accessing anything that would be important immediately upon your death or disability, or items that a spouse or family member would need to know how to pay/access/collect. Also consider weekly/monthly occurrences that should be maintained. Think about the things that you do daily/weekly/monthly/annually that your spouse or family member would need to continue/cancel. Some items have been filled in to help get you started. Additional blank sheets are provided to allow completely personalized sheets.

The “Where to Find it” sheet is a good place to provide information on items that you don’t want to, or can’t document in writing, such as account information, child custody documents, etc. However, it is recommended that you combine this printable with any other pertinent documents and place in an easy (for your family) to find location. Note - this does not replace the need for a Will or other legal advice.

Suggestions Include:

Checking Accounts

Savings Accounts

Credit Unions

Paypal Accounts

Stocks/Bonds

Money Markets

Pension Plans

401K

Life Insurance Policies

Websites (account, blogs, etc)

Iphone access info

Credit Cards Owed

Auto Loan

Mortgage

Insurances

Cable

Electric

Utilites

Computer access

Wifi

Netflix/Itunes/Amazon

etc.

Access Information

With _____ Address: _____
Website: _____
Username: _____ Password: _____
Other: _____

With _____ Address: _____
Website: _____
Username: _____ Password: _____
Other: _____

With _____ Address: _____
Website: _____
Username: _____ Password: _____
Other: _____

Bills to Pay

What _____ Address: _____
Website: _____
Username: _____ Password: _____
Amount: _____ Due: _____

What _____ Address: _____
Website: _____
Username: _____ Password: _____
Amount: _____ Due: _____

What _____ Address: _____
Website: _____
Username: _____ Password: _____
Amount: _____ Due: _____

Where to Find It

What	Where	Notes
Address Book		
Birth Certificate		
Car Keys		
Checkbooks		
Children's Birth Cert.		
Children's SS Cards		
Collectables		
Collectables		
Collectables		
Computer		
Debit/Credit Cards		
Deeds		
Divorce Papers		
Heirlooms		
Home Safe		
Iphone		
Jewelry		

Where to Find It

What	Where	Notes
Marrage Cert.		
Medical Cards/Forms		
Pet Records		
Policies - Auto		
Policies - Health		
Policies - Home		
Policies - Life		
Safety Deposit Key		
Social Security #		
Tablets		
Tax Documents		
Title/Registristration		
Vaccination Records		
Will		

People To Contact

Who	Name	Phone/email	Other
Attorney			
Church			
Co Worker			
Co Worker			
Dr			
Employer			
Family			
Family			
Family			
Family			
Friend			
Friend			
Friend			
Friend			
Funeral			
Life Policy			
Pastor			

Subscriptions to Cancel

With	Account #	Phone/Email	Website	User/ Password
Magazine				
Newspaper				
rx				

About My Children

Child's Name: _____ **Age:** _____

Dr: _____ **Phone:** _____

School: _____

Allergies: _____

Medications: _____

Other: _____

Child's Name: _____ **Age:** _____

Dr: _____ **Phone:** _____

School: _____

Allergies: _____

Medications: _____

Other: _____

About My Pets

Pet Name: _____ **Age:** _____

Vet: _____ **Phone:** _____

Food Brand: _____

Allergies: _____

Medications: _____

Other: _____

Pet Name: _____ **Age:** _____

Vet: _____ **Phone:** _____

Food Brand: _____

Allergies: _____

Medications: _____

Other: _____