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This Is What Matters

The Compassionate Estate Planning Workbook
Simplified Edition — free from gatheringwhatmatters.com

Kristin Smith, J.D., M.B.A.

A workbook from the Holding What Matters series

holdingwhatmatters.com

This Is What Matters

The Compassionate Estate Planning Workbook — Color Edition

by Kristin Smith, J.D., M.B.A.

A peace-of-mind companion for the people who love you.

From the Holding What Matters series

by Stellarus Press

Written by Kristin Smith, J.D., M.B.A.

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This workbook is offered as an organizational aid for personal use. It is not a substitute for legal, tax, financial, medical, or estate-planning advice. Please consult appropriate professionals for guidance specific to your situation.

How to use this workbook

This is not a test. It is not a deadline. It is a love letter, slow-walked.

Take it one section at a time — fifteen minutes here, an hour there. Skip what doesn't apply. Come back to what's hard. And know that you're helping your loved ones by putting things in order.

A few small kindnesses to yourself

- [ ] **You don't have to start at the beginning.** Open to whichever color calls to you today.
- [ ] **"Not applicable" is a complete answer.** Cross it off and move on.
- [ ] **Pencil is welcome.** Things change. So can your answers.
- [ ] **Never write actual passwords here.** Note where they're kept — a password manager, a sealed envelope in a drawer, a trusted person.
- [ ] **Tell someone where this workbook lives.** A workbook no one can find is just a private journal.

A note on the colors

Each chapter is dressed in its own hue — not as decoration, but as a wayfinder. When the day comes that someone needs the auto insurance policy in a hurry, they'll learn to flip to sun gold. When they need the will, they'll know to find iris purple. The rainbow is the table of contents your loved ones can feel.

What's inside

PART ONE — THE SEVEN CHAPTERS

PART TWO — MORE SPACE

CHAPTER 1 OF 7

My Trusted Circle

The people your family should be able to reach

These are the names and numbers your loved ones will reach for first — the attorney who knows your story, the doctor who knows your history, the friend who has the spare key. Write them down here so no one has to go searching when they're already overwhelmed.

1

☐ Estate / Probate Attorney

Who handles the will and estate?

NAME

FIRM

PHONE

EMAIL

NOTES

ADDITIONAL CONTACT #1

NAME

ROLE / TITLE

PHONE

EMAIL

ADDITIONAL CONTACT #2

NAME

ROLE / TITLE

PHONE

EMAIL

ADDITIONAL CONTACT #3

NAME

ROLE / TITLE

PHONE

EMAIL

▢ Financial Advisor / Stockbroker

Who manages investments?

NAME

FIRM

PHONE

EMAIL

NOTES

ADDITIONAL CONTACT #1

NAME

ROLE / TITLE

PHONE

EMAIL

ADDITIONAL CONTACT #2

NAME

ROLE / TITLE

PHONE

EMAIL

ADDITIONAL CONTACT #3

NAME

ROLE / TITLE

PHONE

EMAIL

▢ Accountant / Tax Preparer

Who does the taxes?

NAME

FIRM

PHONE

EMAIL

NOTES

ADDITIONAL CONTACT #1

NAME

ROLE / TITLE

PHONE

EMAIL

ADDITIONAL CONTACT #2

NAME

ROLE / TITLE

PHONE

EMAIL

ADDITIONAL CONTACT #3

NAME

ROLE / TITLE

PHONE

EMAIL

▢ Insurance Agent

Home, auto, life, umbrella?

NAME

COMPANY

PHONE

EMAIL

NOTES

ADDITIONAL CONTACT #1

NAME

ROLE / TITLE

PHONE

EMAIL

ADDITIONAL CONTACT #2

NAME

ROLE / TITLE

PHONE

EMAIL

ADDITIONAL CONTACT #3

NAME

ROLE / TITLE

PHONE

EMAIL

☐ Primary Care Doctor

Main physician — conditions family should know?

NAME

PRACTICE

PHONE

EMAIL

NOTES

ADDITIONAL CONTACT #1

NAME

ROLE / TITLE

PHONE

EMAIL

ADDITIONAL CONTACT #2

NAME

ROLE / TITLE

PHONE

EMAIL

ADDITIONAL CONTACT #3

NAME

ROLE / TITLE

PHONE

EMAIL

▢ Clergy / Spiritual Advisor

If applicable — who to call for services

NAME

CHURCH / ORGANIZATION

PHONE

EMAIL

NOTES

▢ Funeral Home / Director

Pre-arrangements or preferences?

FUNERAL HOME

CONTACT

PHONE

EMAIL

NOTES

☐ Emergency Contacts / Phone Tree

Who to call at 3am — neighbor, sibling, best friend

NAME

RELATIONSHIP

PHONE

EMAIL

NOTES

EMERGENCY CONTACT #2

NAME

RELATIONSHIP

PHONE

EMAIL

NOTES

EMERGENCY CONTACT #3

NAME

RELATIONSHIP

PHONE

EMAIL

NOTES

EMERGENCY CONTACT #4

NAME

RELATIONSHIP

PHONE

EMAIL

NOTES

☐ Additional Advisor *optional*

Anyone else your family should know about

NAME

ROLE

PHONE

EMAIL

NOTES

ADDITIONAL CONTACT #1

NAME

ROLE / TITLE

PHONE

EMAIL

ADDITIONAL CONTACT #2

NAME

ROLE / TITLE

PHONE

EMAIL

ADDITIONAL CONTACT #3

NAME

ROLE / TITLE

PHONE

EMAIL

CHAPTER 2 OF 7

Financial Accounts

Where the money lives — just the basics

Money can live in many places. Where you bank. Where you save. Where your investments are held. None of this needs to be a mystery — just a list of where to look. Only add the last four digits of any account number, or for even more safety, just skip account numbers entirely; the institutions can confirm those when the time comes.

☐ Primary Checking Account

Main bank account for day-to-day

BANK

HOLDER(S)

BRANCH / BANKER

EMAIL

NOTES

CHECKING ACCOUNT #2

BANK

HOLDER(S)

BRANCH / BANKER

EMAIL

NOTES

CHECKING ACCOUNT #3

BANK

HOLDER(S)

BRANCH / BANKER

EMAIL

NOTES

▢ Savings Account(s)

Emergency fund, money market, CDs

BANK

HOLDER(S)

PURPOSE

NOTES

SAVINGS ACCOUNT #2

BANK

HOLDER(S)

PURPOSE

NOTES

SAVINGS ACCOUNT #3

BANK

HOLDER(S)

PURPOSE

NOTES

▢ Retirement Accounts

401(k), IRA, Roth

INSTITUTION

TYPE

BENEFICIARY

NOTES

RETIREMENT ACCOUNT #2

INSTITUTION

TYPE

BENEFICIARY

NOTES

RETIREMENT ACCOUNT #3

INSTITUTION

TYPE

BENEFICIARY

NOTES

▢ Pension / Defined Benefit Plan

Survivor benefits could be significant

EMPLOYER / PROVIDER

SURVIVOR BENEFIT?

HR / PLAN CONTACT

EMAIL

NOTES

▢ Social Security

Note your status and account info

CURRENT STATUS

MY SOCIAL SECURITY ACCOUNT?

WHERE IS SS CARD?

NOTES

▢ Investment / Brokerage Accounts

Non-retirement investments

INSTITUTION

HOLDER(S)

NOTES

INVESTMENT ACCOUNT #2

INSTITUTION

HOLDER(S)

NOTES

INVESTMENT ACCOUNT #3

INSTITUTION

HOLDER(S)

NOTES

▢ Mortgage / Home Loan

Who holds the mortgage?

LENDER

PROPERTY

NOTES

MORTGAGE #2

LENDER

PROPERTY

NOTES

MORTGAGE #3

LENDER

PROPERTY

NOTES

☐ Credit Cards

Which cards exist? (not the numbers!)

CARD

CARDHOLDER

NOTES

CREDIT CARD #2

CARD

CARDHOLDER

NOTES

CREDIT CARD #3

CARD

CARDHOLDER

NOTES

CREDIT CARD #4

CARD

CARDHOLDER

NOTES

▢ Monthly Bills

What needs to keep getting paid

REGULAR MONTHLY BILLS

WHICH ARE ON AUTO-PAY?

☐ Annual Bills & Obligations

Property tax, HOA, memberships

ANNUAL OBLIGATIONS

Subscriptions to Cancel

Services that keep charging if no one cancels

ACTIVE SUBSCRIPTIONS

NOTES

☐ Business Ownership

LLC, partnership — who takes over?

BUSINESS NAME & TYPE

PARTNERS

BUSINESS BANK ACCOUNT

OPERATING AGREEMENT LOCATION

NOTES

☐ Cryptocurrency & Digital Assets

Without the keys, crypto is gone forever

WHAT DO YOU HOLD?

HOW TO ACCESS WALLETS

NOTES

☐ Outstanding Loans & Obligations *optional*

No judgment — just helpful for family to know

LOAN TYPE

LENDER

NOTES

LOAN #2

LOAN TYPE

LENDER

NOTES

LOAN #3

LOAN TYPE

LENDER

NOTES

CHAPTER 3 OF 7

Insurance Policies

Policy numbers, agents, and where to find documents

The policies you've paid into for years are only useful if someone can find them. Provider, policy number, agent, location of paperwork — five minutes per policy now is hours saved later, at the worst possible time.

3

☐ Life Insurance

Term, whole life, employer — often most urgent

PROVIDER

TYPE

POLICY NUMBER

BENEFICIARY

AGENT

AGENT EMAIL

WHERE TO FIND POLICY

POLICY LOAN?

NOTES

LIFE INSURANCE POLICY #2

PROVIDER

TYPE

POLICY NUMBER

BENEFICIARY

AGENT

AGENT EMAIL

WHERE TO FIND POLICY

POLICY LOAN?

NOTES

LIFE INSURANCE POLICY #3

PROVIDER

TYPE

POLICY NUMBER

BENEFICIARY

AGENT

AGENT EMAIL

WHERE TO FIND POLICY

POLICY LOAN?

NOTES

▢ Homeowner's / Renter's Insurance

Coverage for home and belongings

PROVIDER

POLICY NUMBER

AGENT

AGENT EMAIL

WHERE TO FIND POLICY

NOTES

▢ Auto Insurance

Who covers the vehicles?

PROVIDER

POLICY NUMBER

VEHICLES COVERED

WHERE TO FIND POLICY / CARD

NOTES

☐ Health Insurance

Employer, marketplace, or Medicare?

PROVIDER

MEMBER NUMBER

SOURCE

WHERE TO FIND CARD

NOTES

☐ Dental / Vision Insurance

Often separate from health

PROVIDER(S)

MEMBER NUMBER

WHERE TO FIND CARD

NOTES

☐ Long-Term Care Insurance

Critical info for family planning

PROVIDER

POLICY NUMBER

WHERE TO FIND POLICY

POLICY LOAN?

NOTES

▢ Disability Insurance

Short-term or long-term — often through employer

PROVIDER

POLICY NUMBER

TYPE

WHERE TO FIND POLICY

NOTES

☐ Umbrella / Other Policies

Umbrella, valuables rider, boat, travel

POLICY TYPE

PROVIDER

POLICY NUMBER

WHERE TO FIND POLICY

POLICY LOAN?

NOTES

POLICY #2

POLICY TYPE

PROVIDER

POLICY NUMBER

WHERE TO FIND POLICY

POLICY LOAN?

NOTES

POLICY #3

POLICY TYPE

PROVIDER

POLICY NUMBER

WHERE TO FIND POLICY

POLICY LOAN?

NOTES

Assets & Valuables

What you've built and gathered — and who should get it

Some things are worth money. Some things are worth more than money. The deed to the house, the title to the car, the ring that belonged to your grandmother — write down what they are, where they live, and who they're meant for. It saves your family from having to guess at love.

☐ Real Estate / Property

Home, vacation home, rental, land

PROPERTY

OWNERSHIP

WHERE IS THE DEED?

NOTES

PROPERTY #2

PROPERTY

OWNERSHIP

WHERE IS THE DEED?

NOTES

PROPERTY #3

PROPERTY

OWNERSHIP

WHERE IS THE DEED?

NOTES

▢ Vehicles

Cars, boats, RVs, motorcycles

VEHICLE

OWNED / LEASED / LOAN?

WHERE IS THE TITLE?

NOTES

VEHICLE #2

VEHICLE

OWNED / LEASED / LOAN?

WHERE IS THE TITLE?

NOTES

VEHICLE #3

VEHICLE

OWNED / LEASED / LOAN?

WHERE IS THE TITLE?

NOTES

Furniture

Notable pieces — antiques, heirlooms, custom-built, or anything you'd want to pass on

ITEM

WHERE IT'S KEPT

INTENDED FOR

ESTIMATED VALUE

NOTES

PIECE #2

ITEM

WHERE IT'S KEPT

INTENDED FOR

ESTIMATED VALUE

NOTES

PIECE #3

ITEM

WHERE IT'S KEPT

INTENDED FOR

ESTIMATED VALUE

NOTES

PIECE #4

ITEM

WHERE IT'S KEPT

INTENDED FOR

ESTIMATED VALUE

NOTES

Appliances

Major home appliances — model numbers, warranty info if recent

ITEM

BRAND / MODEL

WHERE IT IS

WARRANTY / SERVICE

NOTES

APPLIANCE #2

ITEM

BRAND / MODEL

WHERE IT IS

WARRANTY / SERVICE

NOTES

APPLIANCE #3

ITEM

BRAND / MODEL

WHERE IT IS

WARRANTY / SERVICE

NOTES

Electronics & Equipment

Computers, cameras, tools, instruments

ITEM

NOTES

ITEM #2

ITEM

NOTES

ITEM #3

ITEM

NOTES

☐ Personal Items

Other items of personal or sentimental value — jewelry, art, collections, mementos

ITEM

WHERE IT'S KEPT

INTENDED FOR

ESTIMATED / SENTIMENTAL VALUE

NOTES

ITEM #2

ITEM

WHERE IT'S KEPT

INTENDED FOR

ESTIMATED / SENTIMENTAL VALUE

NOTES

ITEM #3

ITEM

WHERE IT'S KEPT

INTENDED FOR

ESTIMATED / SENTIMENTAL VALUE

NOTES

ITEM #4

ITEM

WHERE IT'S KEPT

INTENDED FOR

ESTIMATED / SENTIMENTAL VALUE

NOTES

☐ Safe Deposit Box

Where is it, where's the key, who has access?

LOCATION

WHERE IS THE KEY?

WHAT'S INSIDE?

WHO HAS ACCESS?

▢ Storage Unit(s)

Easy to forget, expensive to abandon

FACILITY & UNIT #

KEY / CODE

WHAT'S INSIDE?

NOTES

STORAGE UNIT #2

FACILITY & UNIT #

KEY / CODE

WHAT'S INSIDE?

NOTES

STORAGE UNIT #3

FACILITY & UNIT #

KEY / CODE

WHAT'S INSIDE?

NOTES

CHAPTER 5 OF 7

Digital Keys

Where to FIND access — never add actual passwords here

Almost everything important now hides behind a password. This is not where you write the passwords down. This is where you tell your family how to find them — the manager, the recovery kit, the sealed envelope, the trusted friend. Imagine someone you love trying to get into your phone. What do they need to know?

Safety: Never add actual passwords here. Note where they can be found — a password manager, a sealed envelope, a trusted person.

▢ Password Manager

The master key to everything — #1 priority

WHICH MANAGER?

HOW TO ACCESS MASTER PASSWORD

▢ Email Accounts

Email is the gateway to resetting everything

EMAIL ADDRESS

PROVIDER

HOW TO ACCESS

EMAIL ACCOUNT #2

EMAIL ADDRESS

PROVIDER

HOW TO ACCESS

EMAIL ACCOUNT #3

EMAIL ADDRESS

PROVIDER

HOW TO ACCESS

▢ Phone / Device PINs

How to unlock phone, tablet, computer

DEVICE

HOW TO UNLOCK

DEVICE #2

DEVICE

HOW TO UNLOCK

DEVICE #3

DEVICE

HOW TO UNLOCK

Social Media Accounts

For memorialization or closure

PLATFORM

USERNAME / PROFILE

WISHES

SOCIAL MEDIA ACCOUNT #2

PLATFORM

USERNAME / PROFILE

WISHES

SOCIAL MEDIA ACCOUNT #3

PLATFORM

USERNAME / PROFILE

WISHES

SOCIAL MEDIA ACCOUNT #4

PLATFORM

USERNAME / PROFILE

WISHES

▢ Financial Logins

Bank websites, investment portals

SERVICE

HOW TO ACCESS

FINANCIAL LOGIN #2

SERVICE

HOW TO ACCESS

FINANCIAL LOGIN #3

SERVICE

HOW TO ACCESS

FINANCIAL LOGIN #4

SERVICE

HOW TO ACCESS

CHAPTER 6 OF 7

Important Documents

Where to find the papers that matter most

The will. The trust. The advance directive. Birth certificates and passports and the DD-214 from a long-ago war. They're useful only when they're findable — and they're findable only when someone knows where you put them. This is your map.

▢ Will / Trust

The most critical document — where is it?

TYPE

WHERE IT'S KEPT

WHO DRAFTED IT?

NOTES

▢ Power of Attorney

Financial POA and Healthcare POA

FINANCIAL POA

HEALTHCARE POA

WHERE ARE DOCUMENTS?

NOTES

▢ Advance Directive / Living Will

Medical wishes if you can't communicate

WHERE IT'S KEPT

NOTES

☐ Property Deeds & Titles

Proof of ownership

WHERE THEY'RE KEPT

NOTES

☐ Tax Returns

Where are recent returns filed?

WHERE THEY'RE KEPT

TAX PREPARER

NOTES

☐ Birth Certificates, Passports, SSN Cards

Identity documents

WHERE THEY'RE KEPT

NOTES

☐ Military / Veterans Records

DD-214, VA benefits, burial eligibility

BRANCH OF SERVICE

WHERE IS THE DD-214?

VA BENEFITS?

NOTES

What I Want You to Know

In your own words — the things that can't go in a form

This is the part no form can hold. Where you tell them about cremation or burial. About the songs you'd want played. About the dog who needs a new home. About what you would have said, if you'd had time to write a letter. Take your time here. This is the heart of it.

☐ Organ / Body Donation Wishes

⏱ Time-critical — must be known within hours

REGISTERED ORGAN DONOR?

WHOLE BODY DONATION?

SPECIFIC WISHES

▢ Funeral / Memorial Preferences

Burial vs. cremation, timing (some traditions require burial within 24 hours), service style, music

— Funeral / Memorial Preferences (page 2 of 2) —

☐ A Letter to My Family

They'll treasure this forever — there's no wrong length

— A Letter to My Family (page 2 of 3) —

— A Letter to My Family (page 3 of 3) —

▢ Charitable Wishes

Organizations you'd like supported

▢ Pet Care Instructions

Who takes the pets? Vet info, routines, what they need

— Pet Care Instructions (page 2 of 2) —

▢ Religious or Cultural Preferences

Traditions, observances, or frameworks that should shape your estate plan or end-of-life arrangements — for example: Islamic inheritance principles (farāʾiḍ), specific religious burial customs, family practices for ongoing remembrance, or charitable obligations from your tradition

PART TWO

More Space

Room to grow into

Because life keeps adding people, accounts, policies, and stories — and because no workbook ever has quite enough room. The pages that follow are extra fields for every chapter, organized by color, plus a stack of free-form pages at the end for anything that doesn't fit anywhere else.

More space for My Trusted Circle

For anything that didn't fit on the earlier pages of this chapter — extra people, things you remembered later, updates as life changes.

PERSON 1

NAME / ROLE

PHONE

EMAIL

NOTES

PERSON 2

NAME / ROLE

PHONE

EMAIL

NOTES

PERSON 3

NAME / ROLE

PHONE

EMAIL

NOTES

My Trusted Circle — continued

PERSON 4

NAME / ROLE

PHONE

EMAIL

NOTES

PERSON 5

NAME / ROLE

PHONE

EMAIL

NOTES

PERSON 6

NAME / ROLE

PHONE

EMAIL

NOTES

My Trusted Circle — continued

PERSON 7

NAME / ROLE

PHONE

EMAIL

NOTES

PERSON 8

NAME / ROLE

PHONE

EMAIL

NOTES

PERSON 9

NAME / ROLE

PHONE

EMAIL

NOTES

My Trusted Circle — continued

PERSON 10

NAME / ROLE

PHONE

EMAIL

NOTES

PERSON 11

NAME / ROLE

PHONE

EMAIL

NOTES

PERSON 12

NAME / ROLE

PHONE

EMAIL

NOTES

More space for Financial Accounts

For anything that didn't fit on the earlier pages of this chapter — extra accounts, things you remembered later, updates as life changes.

ACCOUNT 1

INSTITUTION / TYPE

HOLDER(S)

BANKER / CONTACT

EMAIL

NOTES

ACCOUNT 2

INSTITUTION / TYPE

HOLDER(S)

BANKER / CONTACT

EMAIL

NOTES

ACCOUNT 3

INSTITUTION / TYPE

HOLDER(S)

BANKER / CONTACT

EMAIL

NOTES

Financial Accounts — continued

ACCOUNT 4

INSTITUTION / TYPE

HOLDER(S)

BANKER / CONTACT

EMAIL

NOTES

ACCOUNT 5

INSTITUTION / TYPE

HOLDER(S)

BANKER / CONTACT

EMAIL

NOTES

ACCOUNT 6

INSTITUTION / TYPE

HOLDER(S)

BANKER / CONTACT

EMAIL

NOTES

Financial Accounts — continued

2

ACCOUNT 7

INSTITUTION / TYPE

HOLDER(S)

BANKER / CONTACT

EMAIL

NOTES

ACCOUNT 8

INSTITUTION / TYPE

HOLDER(S)

BANKER / CONTACT

EMAIL

NOTES

ACCOUNT 9

INSTITUTION / TYPE

HOLDER(S)

BANKER / CONTACT

EMAIL

NOTES

Financial Accounts — continued

ACCOUNT 10

INSTITUTION / TYPE

HOLDER(S)

BANKER / CONTACT

EMAIL

NOTES

ACCOUNT 11

INSTITUTION / TYPE

HOLDER(S)

BANKER / CONTACT

EMAIL

NOTES

ACCOUNT 12

INSTITUTION / TYPE

HOLDER(S)

BANKER / CONTACT

EMAIL

NOTES

More space for Insurance Policies

For anything that didn't fit on the earlier pages of this chapter — extra policies, things you remembered later, updates as life changes.

POLICY 1

PROVIDER / TYPE

POLICY NUMBER

AGENT

AGENT EMAIL

WHERE TO FIND POLICY

NOTES

POLICY 2

PROVIDER / TYPE

POLICY NUMBER

AGENT

AGENT EMAIL

WHERE TO FIND POLICY

NOTES

Insurance Policies — continued

POLICY 3

PROVIDER / TYPE

POLICY NUMBER

AGENT

AGENT EMAIL

WHERE TO FIND POLICY

NOTES

POLICY 4

PROVIDER / TYPE

POLICY NUMBER

AGENT

AGENT EMAIL

WHERE TO FIND POLICY

NOTES

Insurance Policies — continued

POLICY 5

PROVIDER / TYPE

POLICY NUMBER

AGENT

AGENT EMAIL

WHERE TO FIND POLICY

NOTES

POLICY 6

PROVIDER / TYPE

POLICY NUMBER

AGENT

AGENT EMAIL

WHERE TO FIND POLICY

NOTES

Insurance Policies — continued

POLICY 7

PROVIDER / TYPE

POLICY NUMBER

AGENT

AGENT EMAIL

WHERE TO FIND POLICY

NOTES

POLICY 8

PROVIDER / TYPE

POLICY NUMBER

AGENT

AGENT EMAIL

WHERE TO FIND POLICY

NOTES

Insurance Policies — continued

POLICY 9

PROVIDER / TYPE

POLICY NUMBER

AGENT

AGENT EMAIL

WHERE TO FIND POLICY

3

NOTES

POLICY 10

PROVIDER / TYPE

POLICY NUMBER

AGENT

AGENT EMAIL

WHERE TO FIND POLICY

NOTES

More space for Assets & Valuables

For anything that didn't fit on the earlier pages of this chapter — extra items, things you remembered later, updates as life changes.

ITEM 1

ITEM

WHERE IT'S KEPT

INTENDED FOR

ESTIMATED VALUE

NOTES

ITEM 2

ITEM

WHERE IT'S KEPT

INTENDED FOR

ESTIMATED VALUE

NOTES

ITEM 3

ITEM

WHERE IT'S KEPT

INTENDED FOR

ESTIMATED VALUE

NOTES

Assets & Valuables — continued

ITEM 4

ITEM

WHERE IT'S KEPT

INTENDED FOR

ESTIMATED VALUE

NOTES

ITEM 5

ITEM

WHERE IT'S KEPT

INTENDED FOR

ESTIMATED VALUE

NOTES

ITEM 6

ITEM

WHERE IT'S KEPT

INTENDED FOR

ESTIMATED VALUE

NOTES

Assets & Valuables — continued

ITEM 7

ITEM

WHERE IT'S KEPT

INTENDED FOR

ESTIMATED VALUE

NOTES

ITEM 8

ITEM

WHERE IT'S KEPT

INTENDED FOR

ESTIMATED VALUE

NOTES

ITEM 9

ITEM

WHERE IT'S KEPT

INTENDED FOR

ESTIMATED VALUE

NOTES

More space for Digital Keys

For anything that didn't fit on the earlier pages of this chapter — extra services, things you remembered later, updates as life changes.

SERVICE 1

SERVICE / ACCOUNT

HOW TO ACCESS (NEVER WRITE THE PASSWORD ITSELF)

NOTES

SERVICE 2

SERVICE / ACCOUNT

HOW TO ACCESS (NEVER WRITE THE PASSWORD ITSELF)

NOTES

SERVICE 3

SERVICE / ACCOUNT

HOW TO ACCESS (NEVER WRITE THE PASSWORD ITSELF)

NOTES

Digital Keys — continued

SERVICE 4

SERVICE / ACCOUNT

HOW TO ACCESS (NEVER WRITE THE PASSWORD ITSELF)

NOTES

SERVICE 5

SERVICE / ACCOUNT

HOW TO ACCESS (NEVER WRITE THE PASSWORD ITSELF)

NOTES

SERVICE 6

SERVICE / ACCOUNT

HOW TO ACCESS (NEVER WRITE THE PASSWORD ITSELF)

NOTES

Digital Keys — continued

SERVICE 7

SERVICE / ACCOUNT

HOW TO ACCESS (NEVER WRITE THE PASSWORD ITSELF)

NOTES

SERVICE 8

SERVICE / ACCOUNT

HOW TO ACCESS (NEVER WRITE THE PASSWORD ITSELF)

NOTES

SERVICE 9

SERVICE / ACCOUNT

HOW TO ACCESS (NEVER WRITE THE PASSWORD ITSELF)

NOTES

Digital Keys — continued

SERVICE 10

SERVICE / ACCOUNT

HOW TO ACCESS (NEVER WRITE THE PASSWORD ITSELF)

NOTES

SERVICE 11

SERVICE / ACCOUNT

HOW TO ACCESS (NEVER WRITE THE PASSWORD ITSELF)

NOTES

SERVICE 12

SERVICE / ACCOUNT

HOW TO ACCESS (NEVER WRITE THE PASSWORD ITSELF)

NOTES

More space for Important Documents

For anything that didn't fit on the earlier pages of this chapter — extra documents, things you remembered later, updates as life changes.

DOCUMENT 1

DOCUMENT TYPE

WHERE IT'S KEPT

NOTES

DOCUMENT 2

DOCUMENT TYPE

WHERE IT'S KEPT

NOTES

DOCUMENT 3

DOCUMENT TYPE

WHERE IT'S KEPT

NOTES

Important Documents — continued

DOCUMENT 4

DOCUMENT TYPE

WHERE IT'S KEPT

NOTES

DOCUMENT 5

DOCUMENT TYPE

WHERE IT'S KEPT

NOTES

DOCUMENT 6

DOCUMENT TYPE

WHERE IT'S KEPT

NOTES

Important Documents — continued

DOCUMENT 7

DOCUMENT TYPE

WHERE IT'S KEPT

NOTES

DOCUMENT 8

DOCUMENT TYPE

WHERE IT'S KEPT

NOTES

DOCUMENT 9

DOCUMENT TYPE

WHERE IT'S KEPT

NOTES

Important Documents — continued

DOCUMENT 10

DOCUMENT TYPE

WHERE IT'S KEPT

NOTES

DOCUMENT 11

DOCUMENT TYPE

WHERE IT'S KEPT

NOTES

DOCUMENT 12

DOCUMENT TYPE

WHERE IT'S KEPT

NOTES

More space for What I Want You to Know

For anything that didn't fit on the earlier pages of this chapter — extra topics, things you remembered later, updates as life changes.

TOPIC 1

TOPIC / HEADING

IN YOUR OWN WORDS

TOPIC 2

TOPIC / HEADING

IN YOUR OWN WORDS

What I Want You to Know — continued

TOPIC 3

TOPIC / HEADING

IN YOUR OWN WORDS

TOPIC 4

TOPIC / HEADING

IN YOUR OWN WORDS

What I Want You to Know — continued

TOPIC 5

TOPIC / HEADING

IN YOUR OWN WORDS

TOPIC 6

TOPIC / HEADING

IN YOUR OWN WORDS

Free-form overflow

For anything that didn't fit anywhere else, or that touches more than one chapter. Tick the colored boxes to mark which category each entry belongs to. Future-you (or your family) will thank you for noting it down.

ENTRY 1

- [ ] MY TRUSTED CIRCLE
- [ ] FINANCIAL ACCOUNTS
- [ ] INSURANCE POLICIES
- [ ] ASSETS & VALUABLES
- [ ] DIGITAL KEYS
- [ ] IMPORTANT DOCUMENTS
- [ ] WHAT I WANT YOU TO KNOW

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ENTRY 2

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