

SECTION ONE

The People

Who steps in, and in what order. On the hardest day, no one should have to think about who to call. Write it here once, and the first hour is already handled.

THE PERSON IN CHARGE (EXECUTOR)

Full name, phone, and where your signed will names them.

THEIR BACKUP

If the first person cannot serve, who takes over.

CALL FIRST

Family and closest friends, in order.

THE PROFESSIONALS

Lawyer, accountant, financial advisor, insurance agent.

WHO TAKES THE PETS

Name and phone. They should already know.

SECTION TWO

The Paperwork

You are not copying documents here. You are writing a map of where each one lives, so nobody spends weeks opening drawers.

The location rule: write where the document is kept, never its contents. "Will: gray fire safe, hall closet" is all your family needs.

THE WILL (AND TRUST, IF ANY)

Exact location, plus the lawyer who drafted it.

DEEDS & TITLES

House, vehicles, land.

INSURANCE POLICIES

Life, home, auto. Company and where the policy sits.

BIRTH & MARRIAGE CERTIFICATES

SAFE OR SAFETY DEPOSIT BOX

Where the key is, and who may open it.

SECTION FOUR

The Digital Life

The phone, the email, the photos. Most of a life now sits behind one locked screen. This page keeps your family from losing it.

The safety rule: never write a password in this planner. Write where the keys are kept: a sealed envelope, a password manager, a note in the safe. The planner stays safe even if someone else sees it.

PHONE PASSCODE

Where it is kept (not the code itself).

PRIMARY EMAIL ACCOUNT

The address, and where its key is kept. Email is the master key to everything else.

PASSWORD MANAGER

Which one, and where the master key lives.

PHOTOS

Where they live: iCloud, Google, drives.

LEGACY CONTACTS SET UP

Apple Legacy Contact, Google Inactive Account Manager. Tick when done.
