What Your Family Needs to Know

Starter checklist: twelve categories families often overlook when preparing for illness, incapacity, or death.

1. Legal documents Will, trust, powers of attorney, healthcare directives, marriage/birth certificates, and where originals are stored.	**2. Who should coordinate** Preferred family point person, backup person, attorney contact, and any limits on who can legally act.
3. Financial accounts Banks, investment accounts, retirement accounts, pensions, account owners, beneficiaries, and advisors.	**4. House and property** Deed, mortgage, insurance, property taxes, utilities, alarm, keys, vehicles, storage units, and valuables.
5. Insurance Life, home, auto, health, long-term care, umbrella policies, policy locations, and claim contacts.	**6. Healthcare wishes** Doctors, medications, allergies, health insurance, preferred hospital, end-of-life wishes, and decision-makers.
7. Passwords and access Password manager, emergency access, two-factor devices, backup codes, phone/computer logins, and cloud storage.	**8. Email and social media** Email accounts, Facebook, Instagram, LinkedIn, YouTube, websites, blogs, and memorial/delete preferences.
9. Subscriptions Phone, internet, streaming, software, newspapers, memberships, donations, and other recurring payments.	**10. Household information** Utility shutoffs, service providers, repair people, neighbors, pets, alarm codes, safe/lockbox, and spare keys.
11. Important contacts Estate attorney, financial advisor, accountant, insurance agent, banker, real estate agent, clergy, and close friends.	**12. Personal items** Family photos, heirlooms, jewelry, collections, letters, digital memories, and wishes for special belongings.

Tip: Review this checklist with your estate attorney, financial advisor, and the person you hope will coordinate matters for the family.

This is a starting point, not a legal document.