

**How to use this checklist:** Check off items as you add them to WMFNTK as LifeBytes<sup>SM</sup>. Items marked **HIGH** are the ones your family is most likely to need urgently — start there.

## Legal Documents

Wills, directives, identity

- Last Will and Testament **HIGH**  
Attorney name, location of original
- Durable Power of Attorney **HIGH**
- Healthcare Directive / Living Will **HIGH**
- Healthcare Power of Attorney
- Trust documents
- Guardianship designations
- Birth certificate, passport, SSN card  
Where originals are stored
- Marriage / divorce certificates
- Adoption papers (if applicable)
- Military discharge papers (DD-214)

## Financial Accounts

Banking, investments, retirement

- Checking and savings accounts **HIGH**  
Bank name, account numbers
- Investment / brokerage accounts **HIGH**
- Retirement accounts (401k, IRA) **HIGH**  
Include beneficiary designations
- Safe deposit box  
Bank, box number, key location
- Outstanding debts and loans  
Mortgage, auto, personal loans
- Credit cards  
Issuers and cancellation contacts
- Tax records and CPA contact
- Business interests or partnerships

## Insurance Policies

Life, health, home, auto

- Life insurance **HIGH**  
Insurer, policy number, beneficiaries
- Health insurance **HIGH**  
Plan, member ID, group number
- Homeowner's / renter's insurance  
Policy number, agent contact
- Auto insurance
- Long-term care insurance
- Disability insurance
- Umbrella / liability policy
- Annuities  
Issuer, contract number, terms

## Medical Information

Health history, providers, medications

- Primary care physician **HIGH**  
Name, practice, phone
- Current medications & dosages **HIGH**
- Allergies and adverse reactions **HIGH**
- Chronic conditions and diagnoses
- Specialists and their contacts
- Surgical history
- Organ donor status
- Mental health providers
- Veterans health benefits

## Property & Assets

Real estate, vehicles, valuables

- Real estate deeds and titles **HIGH**  
Address, lender, mortgage number
- Vehicle titles  
Make, model, VIN, lienholder
- Rental / investment properties
- Valuable personal property  
Jewelry, art, collectibles
- Storage units  
Facility, unit number, access code
- Boats, RVs, recreational vehicles
- Firearms  
Location, registration, safe combo

## Digital Accounts

Email, social media, subscriptions

- Primary email account **HIGH**  
Provider and recovery options
- Password manager access **HIGH**  
Service name, how family can access
- Social media accounts  
Platforms, usernames, legacy wishes
- Cloud storage accounts
- Cryptocurrency / digital assets  
Exchange names, wallet types
- Recurring subscriptions to cancel
- Domain names or websites
- Device PINs and computer access

## Personal Wishes

Funeral, legacy, personal notes

- Funeral and burial preferences **HIGH**  
Burial vs cremation, service wishes
- Obituary notes or biography
- Letters to loved ones
- Charitable giving wishes
- Personal property distribution notes
- Pet care instructions  
Vet contact, who should take them
- Religious or cultural wishes

## Key Contacts

Professionals your family may need

- Estate attorney **HIGH**  
Name, firm, phone, email
- Financial advisor **HIGH**
- Accountant / CPA
- Insurance agents
- Executor of your estate
- Trusted family members / friends
- Employer HR contact  
For benefits, 401k administration