

Life & Estate Information Organizer

A practical place to keep the information your family or successor trustee may need later.

Important

This organizer is not your estate plan and does not change your Will, Trust, beneficiary designations, powers of attorney, or other legal documents. Keep your legal documents current with your attorney. Use this booklet to tell trusted people where important information can be found.

Created / Updated on:

Date

Prepared by:

Name

LIFE & ESTATE INFORMATION ORGANIZER

How to Use This Organizer

[START HERE](#)

KEEP IT PRACTICAL - NOT DISPOSITIVE

Use this organizer to help someone locate information and manage day-to-day details if you are unable to do so or after your death. Do not use it to change beneficiaries, trustees, agents, gifts, or other legal instructions. Update those items through the appropriate legal or financial documents.

SECURITY MATTERS

This organizer may contain highly sensitive information. We recommend:

- Complete and store the file only on a secure, password-protected device.
- Do not email a completed copy or upload it to an unsecured shared drive.
- Consider recording where passwords are stored instead of writing every password here.
- Keep a printed copy in a secure place and tell a trusted person where to find it.
- Review this organizer at least once a year and after major life changes.

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LIFE & ESTATE INFORMATION ORGANIZER

Personal & Emergency Information

Full legal name

Preferred name / other names

Home address

Date of birth

Cell phone

Email

Home phone

EMERGENCY CONTACTS

Name / relationship	Phone	Email	Notes

SPOUSE / PARTNER OR CLOSEST FAMILY CONTACT

Name	Relationship	Phone	Email	Location / Notes

Tip

List the people who should be contacted quickly if something happens to you. This page is not intended to name legal decision-makers; your legal documents control those appointments.

LIFE & ESTATE INFORMATION ORGANIZER

Family, Loved Ones & Key People

Use this section for current contact information only. Do not rely on this page to change who receives your assets; your estate plan and beneficiary designations control.

CHILDREN / GRANDCHILDREN / OTHER LOVED ONES

Name	Relationship	Phone	Email	Address / Notes

CHARITIES, ORGANIZATIONS OR CAUSES IMPORTANT TO ME

Organization	Contact / Website	Reason / Notes

Reminder

Charitable gifts or beneficiary changes should be made through the appropriate legal document or account beneficiary form, not by writing them only in this organizer.

LIFE & ESTATE INFORMATION ORGANIZER

Advisors & Professional Contacts

ESTATE PLANNING AND FINANCIAL ADVISORS

Role	Name / company	Phone	Email	Notes

Suggested roles: estate planning attorney, CPA, financial advisor, insurance agent, banker, broker, real estate agent, business attorney.

MEDICAL CONTACTS

Role / specialty	Name / office	Phone	Address / portal

Useful to add

Medication list location, medical portal instructions, pharmacy, insurance cards, and long-term care policy information.

LIFE & ESTATE INFORMATION ORGANIZER

Where My Legal Documents Are Kept

This page is a location guide only. It does not change, replace, or summarize your legal documents.

ESTATE PLANNING DOCUMENTS

Document	Date / version	Original location	Copies / notes
Will			
Revocable Trust			
Trust amendments			
Financial Power of Attorney			
Health Care Power of Attorney			
Living Will / Advance Directive			
HIPAA Authorization			
Other			

Keep current

If a trustee, agent, beneficiary, or guardian has changed, talk with your attorney. Updating this organizer does not update your estate plan.

Attorney / firm to contact

Phone / email

LIFE & ESTATE INFORMATION ORGANIZER

Property, Real Estate & Vehicles

REAL ESTATE

Property / address	How titled / owner	Mortgage / lender	Where deed / records are kept

VEHICLES, BOATS, RVS AND OTHER TITLED PROPERTY

Year / make / model	Owner / title location	Loan / lender	Insurance / notes

Helpful detail

For each asset, note how it is titled and where the title, deed, mortgage, insurance policy, and keys are kept.

LIFE & ESTATE INFORMATION ORGANIZER

Bank, Investment & Retirement Accounts

Do not include full account numbers on a copy you plan to share broadly. A partial number or account nickname is usually enough to help your trustee locate records.

CASH AND BANK ACCOUNTS

Institution	Type / nickname	Owner / title	Beneficiary / POD location

INVESTMENT, RETIREMENT AND ANNUITY ACCOUNTS

Institution / custodian	Type	Owner	Beneficiary confirmation location	Notes

LIFE & ESTATE INFORMATION ORGANIZER

Insurance, Benefits & Income Sources

INSURANCE POLICIES

Type	Company / agent	Policy location	Beneficiary / notes

INCOME AND BENEFITS

Source	Contact / login location	Payment schedule	Notes

Examples

Social Security, pension, employer benefits, VA benefits, disability benefits, rental income, royalties, or other recurring income.

LIFE & ESTATE INFORMATION ORGANIZER

Business Interests, Valuables & Debts

BUSINESS INTERESTS AND IMPORTANT AGREEMENTS

Business / entity	Role / ownership	Records location	Contact / notes

VALUABLES AND PERSONAL PROPERTY

Item / collection	Location	Insurance / appraisal location	Notes

DEBTS AND LIABILITIES

Creditor / lender	Type	Records location	Autopay / notes

LIFE & ESTATE INFORMATION ORGANIZER

Recurring Bills & Household Information

UTILITIES AND SERVICES

Service	Company	Phone / website	Account or login location
Electric			
Gas			
Water / sewer			
Trash / recycling			
Internet			
Phone			
Cable / streaming			
Security system			
House cleaning / yard			

HOUSEHOLD DETAILS

Item	Location / instructions	Contact / notes
Keys / garage codes		
Alarm instructions		
Safe / safe deposit box location		
Mailbox / PO box		
HOA / property manager		
Other		

LIFE & ESTATE INFORMATION ORGANIZER

Digital Accounts & Access Instructions

Security note

Consider listing the location of a secure password manager or password record instead of writing passwords directly in this booklet. Do not email a completed copy.

Password manager / secure password record location

Device unlock instructions location

IMPORTANT DIGITAL ACCOUNTS

Account type	Website / app	Username / email	Password location / notes
Email			
Cell phone			
Computer / tablet			
Cloud storage			
Bank / financial			
Social media			
Subscription / shopping			
Photos / family files			
Other			

LIFE & ESTATE INFORMATION ORGANIZER

Pets & Care Instructions

PETS

Pet name / type / breed	Microchip / license	Vet / medication	Care instructions

PREFERRED CAREGIVERS

Name	Phone / email	Pets they can care for	Notes

Food, medication, routine, and comfort notes

LIFE & ESTATE INFORMATION ORGANIZER

Funeral & Memorial Preferences

These preferences are intended to help your loved ones. They do not replace legally required authorizations or prepaid funeral documents.

Funeral home / church / place of service

Phone / contact

SERVICE PREFERENCES

- ☐ Religious service
- ☐ Memorial service
- ☐ Military honors
- ☐ Celebration of life
- ☐ Burial
- ☐ Cremation
- ☐ Donation arrangements
- ☐ Other

Instructions / wishes

Favorite songs, scripture, poems, quotes

Flowers or charities in lieu of flowers

Cemetery / resting place / niche information

Other personal notes for family

LIFE & ESTATE INFORMATION ORGANIZER

People to Notify & Practical Notes

PEOPLE OR ORGANIZATIONS TO NOTIFY

Name / organization	Relationship / reason	Phone / email	Notes

PRACTICAL ITEMS MY FAMILY MAY NEED TO HANDLE

- ☐ Contact estate planning attorney
 ☐ Locate original Will / Trust documents
- ☐ Notify financial institutions
 ☐ Contact insurance companies
- ☐ Contact retirement plan custodians
 ☐ Notify Social Security / VA if applicable
- ☐ Secure property, vehicles, pets, and mail
 ☐ Review recurring bills and subscriptions

Other notes

LIFE & ESTATE INFORMATION ORGANIZER

Personal Notes & Review Log

This page is for practical notes and reminders. If you want to make legally binding gifts or beneficiary changes, update the appropriate legal documents or beneficiary forms.

PERSONAL PROPERTY NOTES			
Item / category	Location	Person to consult / notes	Document controlling gift

REVIEW LOG			
Date reviewed	Reviewed by	What changed?	Follow-up needed?

When to update this organizer

Review once a year, after a move, after opening or closing major accounts, after changes in family contacts, or whenever you update your estate plan.

Where Are My Documents?

Emergency Reference Card

Do not write passwords, account numbers, safe combinations, or sensitive financial details on this card.

This card tells trusted people where to find important information. Keep sensitive details in the full organizer or another secure location.

My estate planning documents are located:

My Life & Estate Information Organizer is located:

My password manager / access instructions are located:

My attorney / law firm:

My financial advisor:

My CPA / tax advisor:

My insurance information is located:

My safe or safe-deposit box information is located:

Emergency contact:

Print this page and place it where a trusted person can find it. Keep the full organizer in a secure location.