

Leo KIT

66 worksheets · 14 sections · everything in one place





The Leo Kit is provided for general informational and organizational purposes only and does not constitute legal, financial, medical, or tax advice. For matters specific to your situation, please consult a qualified professional.

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1

Getting Started

The essentials — emergency contacts, health information, and important documents — organized and ready.

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Start Here

The Leo Kit is a personal preparedness organizer — a complete record of your life's most important information, organized so the people you love can find what they need without having to search alone. This page explains how to use it.

WHAT THIS KIT IS FOR

- It is a gift to the people who will need to act on your behalf — whether that's a medical emergency, a gradual decline, or a death.
- It is not a legal document. It is a personal record. The legal documents (will, power of attorney, advance directive) are referenced here but stored separately.
- It is only as useful as it is complete. A partially filled kit still helps — but the more you add, the more it protects your family.

HOW TO WORK THROUGH IT

- You do not need to fill everything in at once. Start with Section 2 (Immediate Actions) and Section 9 (Legal and Estate) — those matter most in a crisis.
- Work through the remaining sections at your own pace. Most people complete the kit over a few sittings.
- Return to it after any major life change: a move, a new job, a marriage, a death, a new account, or a change in health.
- Review the whole kit at least once a year. A lot can change.

WHO SHOULD KNOW THIS KIT EXISTS

- At least one trusted person should know where this kit is kept — a spouse, adult child, sibling, or close friend.
- Your executor and your healthcare agent should know it exists and where to find it.
- You do not need to share the contents — just the location.

THIS KIT ORGANIZES. IT DOESN'T ADVISE.

- Leo Kit is a place to gather, record, and organize the information your family needs. It is not a substitute for professional guidance.
- The worksheets here will prompt you to think about your will, your insurance, your healthcare wishes, and more. Completing them doesn't replace the work of an attorney, a financial advisor, or a doctor — it prepares you to have better conversations with those professionals, and makes sure the people you love can find what matters when they need it most.
- When something feels complex or consequential, consult a qualified professional.

Your Setup

IF YOU HAVE THE PHYSICAL LEO KIT BINDER

- Use the digital site (this tool) to fill in your worksheets online, then print each completed page and slip it into the matching file folder in your Leo Kit.
- The numbers on the digital site match the hanging folders (sections) and file folders (worksheets) in your Leo Kit exactly.
- Keep the most sensitive pages (passwords, account numbers, legal documents) in the Leo Pouch or a separate secure location — see Important Documents (1B).
- When you update a worksheet, reprint and replace the old version in your Leo Kit.

Start Here (continued)

IF YOU ARE USING THE DIGITAL KIT ON ITS OWN

- Fill in each worksheet online and download or print the completed pages.
- Store your printed worksheets in a secure, clearly labeled folder or organizer that a trusted person knows about.
- Keep digital copies backed up somewhere safe — a USB drive, a printed PDF set, or a secure cloud folder you control.
- The kit works the same way without the physical Leo Kit box — the organization and content are identical.

TIPS FOR THIS PAGE

- The best time to fill this out is when nothing is wrong. Do it now, while you can think clearly.
- Done is better than perfect. An incomplete kit is still far better than no kit.
- Your information stays on your device — nothing you type here is sent to any server. Download your worksheets to keep permanent copies.
- This kit does not replace an attorney, a financial advisor, or a doctor. It makes their jobs — and your family's job — much easier.

FOR LOVED ONES — YOUR NEXT STEPS

- If you are reading this in a printed kit, the person who filled it out wanted you to have it.
- Start with Section 2 (Immediate Actions and Contacts) for the most urgent next steps.
- If someone has just died, go to Section 14 (How to Use This Kit) or the break-glass sheet in the front of this kit.
- Take your time. This kit is organized to help you work through things step by step — you do not have to do it all at once.

Related sections: Leo Pouch Checklist (1B) · Immediate Actions and Contacts (Section 2) · Legal and Estate (Section 9) · How to Use This Kit (Section 14)

Important Documents

A complete record of where your important documents are stored. Fill in the location column as you gather and organize. Blank rows are your to-do list — they mean that document hasn't been handled yet. For documents stored elsewhere (attorney, bank, safe deposit box), note that location here too. This page is a map, not just a checklist.

WHAT TO WRITE IN THE LOCATION COLUMN

- Leo Kit owners: your kit includes a Leo Pouch — a document bag designed to hold your most important papers. The Leo Pouch is not meant to stay inside the Leo Kit box; it should be stored separately in a safe location (a fireproof safe, a safe deposit box, or another secure spot a trusted person knows about). Write 'Leo Pouch' in the location column for documents you've placed there.
- Digital-only users: designate one secure location for your physical documents — a fireproof safe, a safe deposit box, or a clearly labeled folder works well. Be consistent, and make sure at least one trusted person knows where it is.
- For documents stored somewhere other than your secure location — a deed in a safe deposit box, a title in the glovebox, closing documents in a filing cabinet — note that location instead. The goal is that someone else can find anything on this list without guessing.

Personal Identity

Document	Where It's Stored	Notes (expiration, whose copy, etc.)	N/A
Birth certificate			☐ N/A
Passport			☐ N/A
Social Security card			☐ N/A
Driver's license / state ID			☐ N/A
Marriage certificate			☐ N/A
Divorce decree (if applicable)			☐ N/A
Adoption papers (if applicable)			☐ N/A
Naturalization / citizenship papers (if applicable)			☐ N/A
Military discharge papers / DD-214 (if applicable)			☐ N/A

Important Documents (continued)

Legal and Estate

Document	Where It's Stored	Notes (date signed, last reviewed, attorney)	N/A
Last Will and Testament (original) See Will (9B)			☐ N/A
Trust document (original, if applicable) See Trust (9C)			☐ N/A
Financial Power of Attorney See Power of Attorney (9D)			☐ N/A
Healthcare Power of Attorney See Power of Attorney (9D)			☐ N/A
Advance Directive / Living Will See Advance Directives (4D)			☐ N/A
DNR or POLST (if applicable) See Advance Directives (4D)			☐ N/A
Beneficiary designation schedule See Beneficiary Designations (9E)			☐ N/A
Letter of instruction to executor			☐ N/A

Property and Financial

Document	Where It's Stored	Notes (account last 4, co-owner, date acquired)	N/A
Property deed(s) See Property (Section 5)			☐ N/A
Mortgage documents See Property (Section 5)			☐ N/A
Vehicle title(s) See Vehicles (Section 6)			☐ N/A
Boat / RV / other vehicle title(s) See Other Vehicles (6D)			☐ N/A

Important Documents (continued)

Document	Where It's Stored	Notes (account last 4, co-owner, date acquired)	N/A
Tax returns (most recent 3 years) See Taxes and Accountant (7F)			☐ N/A
Business ownership documents (if applicable) See Business Ownership / Equity (8F)			☐ N/A
Stock certificates / savings bonds See Other Investments / Brokerage Accounts (8E)			☐ N/A
Safe deposit box key — bank name and location			☐ N/A
Safe deposit box contents inventory			☐ N/A

Insurance and Medical

Document	Where It's Stored	Notes (policy number, expiration, provider)	N/A
Life insurance policy / declaration pages See Life Insurance (10B)			☐ N/A
Health insurance card and policy documents See Health Insurance (4C)			☐ N/A
Medicare card (if applicable) See Medicare (11C)			☐ N/A
Long-term care policy (if applicable) See Long-Term Care (10E)			☐ N/A
Homeowner's / renter's insurance policy See Home Insurance (5E)			☐ N/A
Auto insurance cards and policy See Auto Insurance (10G)			☐ N/A

Important Documents (continued)

Document	Where It's Stored	Notes (policy number, expiration, provider)	N/A
Vaccination / immunization records			☐ N/A
Medical records — primary physician			☐ N/A
See Providers and Pharmacies (4B)			

Digital Backups and Access

Physical or digital items that give access to the rest — important to know where these are.

Item	Where It's Stored	Notes (last updated, access instructions)	N/A
USB drive with digital copies of key documents			☐ N/A
Password manager emergency kit or printed access sheet			☐ N/A
This kit — printed copy or digital backup			☐ N/A

TIPS FOR THIS PAGE

- Originals of the will and trust are typically held by your estate attorney — note that here and confirm the location with them.
- Safe deposit box contents require a visit to the bank with a death certificate and legal authority — the key alone is not enough. Make sure your executor knows which bank and has access to the key (see Keys and Access Overview, 1E).
- Copies are fine to keep at home for most documents. Originals stay where they are legally or practically safest.
- Review this page once a year and update it whenever you acquire, move, or dispose of an important document.

FOR LOVED ONES — YOUR NEXT STEPS

- This page tells you where to find original documents — use it before assuming anything is lost.
- Documents held by an attorney, employer, or bank require a death certificate and sometimes legal authority to access — call them before going in person.
- If a document location says 'Leo Pouch' or 'secure folder,' ask the executor or a trusted family member where that is kept.
- If something here cannot be found, contact the institution most likely to hold it — most critical documents can be reissued, though it takes time.

Related sections: Start Here (1A) • Keys and Access Overview (1E) • Legal Snapshot (9A) • Access and Security Notes (12B)

Emergency Info and Key Contacts

Contacts

Use this space for the people who should be contacted first in an emergency.

Name	Phone	Email	Relationship

Emergency Health Information

Use this table to record the essential health and insurance details someone would need to respond quickly in a medical emergency.

Health Insurance

Company

Policy #

Phone

Physical card location

Primary Care

Doctor Name	Practice Name	Phone

Specialists

	Doctor Name	Practice Name	Specialty	Phone
Specialist 1				
Specialist 2				
Specialist 3				

Emergency Info and Key Contacts (continued)

Pharmacy

Pharmacy Name	Phone

Healthcare Proxy / Advance Directive

Proxy Name	Phone	Document Location

QUICK ACCESS REMINDER

- Spare keys are in the Leo Key Pocket (see Keys and Access Overview for the full list).
- Phone PIN or Legacy Contact details are in Digital Life and Security.
- Medication and allergy details are in Health and Medical.

Related sections: [Digital Life and Security](#) · [Health and Medical](#) · [Keys and Access Overview](#)

Additional Notes

Anything else about emergency info or key contacts that doesn't fit above.

Start Here (First Steps After a Loss)

This page is for the person who has just found this kit after a death. We are sorry. Here is what to do right now — in the next few hours. For everything that comes after, go to Section 14.

DO THESE FIRST

- Take a breath. You do not have to do everything today.
- Make sure the death has been legally pronounced — required before a death certificate can be issued. In a hospital, nursing facility, or hospice, staff handle this automatically. For an unexpected death at home, call 911.
- Call the people who need to know — immediate family first. You do not have to do this alone.
- If no funeral home is arranged yet, that call comes next — if pre-arranged, see Section 13E.
- If asked about organ or tissue donation, it's okay to say yes or no — staff will guide you if it applies.
- Secure the home: make sure it is locked, pets are cared for (Section 3C), and mail is being collected.
- Do not distribute anything, cancel accounts, or make financial decisions yet. There is time for that.

WHAT TO FIND IN THIS KIT

- Emergency contacts and key people to notify — Section 2A
- Will and executor information — Section 9B
- Estate attorney contact — Section 9F
- Life insurance policies — Section 10B
- Bank and financial accounts — Sections 7A, 8D, 8E
- Funeral home, pre-arrangements, and memorial wishes — Section 13E

FIRST CALLS TO MAKE (WITHIN 24–48 HOURS)

- The executor named in the will (Section 9B) — they take the lead on the estate.
- The estate attorney (Section 9F) — call before making any financial decisions.
- The employer or HR department (Section 8A) — to notify them and ask about final pay and benefits.
- Social Security (1-800-772-1213) — to stop benefit payments and ask about survivor benefits.

For Everything Else

Section 14 of this kit (How to Use This Kit) walks you through what comes next, organized by topic, and points you to more help at www.walkwithleo.com. Turn there when you are ready.

TIPS FOR THIS PAGE

- Keep this page short and within reach — in a physical kit, it should be the first thing someone sees.
- The personal note field is optional but powerful. Even one sentence helps.
- Point to Section 14 for anything beyond the first few hours — this page is the crisis card, not the full guide.
- Review this page periodically to make sure the section references are still accurate.

FOR LOVED ONES — YOUR NEXT STEPS

- This page was put here for you. Everything else in this kit exists to help you through what comes next.
- You do not have to read the whole kit today. Section 14 will walk you through it when you are ready.
- If you are not sure who to call first: the estate attorney (Section 9F) is the right starting point for almost everything.
- It is okay to ask for help. You were not meant to do this alone.

Related sections: People to Notify (2A) • Will (9B) • Attorney Contact (9F) • Funeral Arrangements (13E) • How to Use This Kit (Section 14)

Start Here (First Steps After a Loss) (continued)

A Note Left for You

The person who filled out this kit may have left you a personal message here.

If you are filling out this kit, you may write a brief note here for the person who finds it first. Keep it short — they need to act, not read. Save longer messages for Section 13C.

Keys and Access Overview

A record of the physical keys, access codes, and combinations your family may need. Keep this page in a secure location — it is sensitive. For digital account access, see Access and Security Notes (12B).

ORGANIZING YOUR SPARE KEYS

- Leo Kit owners: use the color-coded key rings in your kit to tag spare keys, then record the color and location in the table below.
- Digital-only users: any method of labeling spare keys works — colored rings, numbered tags, or labeled envelopes. The goal is that someone else can find and identify the right key without guessing.
- Store spare keys somewhere a trusted person knows about — not hidden at the property they open.

Keys

Color / Tag	What It Opens	Where Spare Key Is Kept	Who Else Has a Copy	Notes
	House keys			
	Vehicle keys			
	Storage unit key			
	Safe or lockbox			
	Mailbox key			
	Other keys			

Codes and Combinations

Record hints or partial information rather than full codes where possible. Store this page securely.

What It Accesses	Code / Combination (or hint)	Where Full Code Is Recorded (if hint only)	Notes
Home alarm system			
Garage door keypad			

Keys and Access Overview (continued)

What It Accesses	Code / Combination (or hint)	Where Full Code Is Recorded (if hint only)	Notes
Gate / community entry			
Fireproof safe combination			
Safe deposit box PIN			
Storage unit lock			

TIPS FOR THIS PAGE

- Do not store this page where it could be found by someone who should not have access — secure location only.
- Whoever is named as your executor or healthcare agent should know where spare keys are kept.
- Review this page after any lock change, new property, or new vehicle.
- Consider whether your executor or a trusted family member has a spare key to your primary home — they may need it quickly.

FOR LOVED ONES — YOUR NEXT STEPS

- The color or tag in the first column corresponds to the key ring label on the spare key set.
- If a key is not where noted, check with the person listed in the 'Who Else Has a Copy' column.
- Alarm codes: if you enter the wrong code, call the monitoring company immediately using the number in Utilities and Home Services (5D).
- Safe deposit box keys require a visit to the bank with a death certificate and legal authority — the key alone is not enough.

Related sections: Leo Pouch Checklist (1B) · Primary Residence (5A) · Access and Security Notes (12B)

2

Immediate Actions and Contacts

Who to call and what to do first — organized for the people who will act on your behalf.

- 2A People to Notify 19
- 2B Organizations and Accounts 21
- 2C Immediate Tasks Checklist 23
- 2D Executor Notes and Log 25



People to Notify

Use this page to list the key contacts who should be reached first. This gives loved ones a clear starting point without having to guess.

Primary Contacts

Category	Name / Organization	Phone / Email	Notes
Immediate family			
Immediate family			
Executor or attorney			
Financial advisor or accountant			
Employer / HR department			
Benefits administrator			
Clergy or faith leader			
Funeral home (preferred)			
Other key contact			

People to Notify (continued)

Category	Name / Organization	Phone / Email	Notes

TIPS FOR THIS PAGE

- Focus on the top 5–10 contacts who can help others take action right away.
- Include full names, organizations, and phone numbers.
- Mark anyone you've already discussed plans with (executor, attorney, etc.).
- Update this list once a year or whenever you change jobs, advisors, or family situations.
- Keep a full extended-contacts list in your Leo Vault or with your Executor Notes.

FOR LOVED ONES — YOUR NEXT STEPS

- Notify immediate family, executor/attorney, and clergy as applicable.
- Inform the employer or HR department to begin benefits and payroll processes.
- Contact key advisors (financial, tax, insurance) and provide death certificates.
- Notify friends and community; reference After-Death Arrangements and Preferences if needed.
- Record all notifications and follow-ups in Executor Notes and Log (2D) or the Leo Vault.

Related sections: Executor Notes and Log (2D) · Legal and Estate

Organizations and Accounts

A quick-reference snapshot of your key accounts and organizations — enough for a survivor to know who to call first. For full account details, insurance policies, retirement accounts, and financial records, see the dedicated sections of this kit (Sections 7, 8, 9, and 10).

Primary Organizations and Accounts

Category	Name / Organization	Account / Policy #	Notes
Banks / credit unions			
Mortgage / loan servicer			
Credit card companies			
Life insurance providers			
Health insurer			
Retirement accounts			
Employer benefits office			
Utility companies			
Subscriptions			
Other			

Organizations and Accounts (continued)

Category	Name / Organization	Account / Policy #	Notes

TIPS FOR THIS PAGE

- Include account or policy numbers if available.
- Add login or access details to the Digital Life and Security section — not here.
- Note if payments or benefits should continue, stop, or be transferred.
- Review this list once a year and remove inactive accounts.
- Include digital financial platforms and online accounts that may hold funds or transferable assets.

FOR LOVED ONES — YOUR NEXT STEPS

- Notify applicable government agencies (SSA, DMV, Vital Records) to stop benefits and obtain certificates.
- Contact financial institutions to freeze, transfer, or close accounts.
- Inform insurers and benefits providers to start claims or transfers.
- Update utilities and cancel or transfer subscriptions.
- Record all actions and confirmations in Executor Notes and Log (2D).

Related sections: Executor Notes and Log (2D) · Digital Life and Security · Legal and Estate

Immediate Tasks Checklist

A timeline of actions for the people who are managing your estate. This is about what to DO and when — not where documents are stored (see Important Documents, 1B) or who to call (see Organizations and Accounts, 2B). Use this as the task checklist that coordinates everything else.

Key Documents to Have Ready

Document	Where It's Stored	Notes
Death certificate (5–10 copies recommended)		
Will See Will (9B)		
Trust documents (if applicable) See Trust (9C)		
Marriage certificate		
Birth certificate(s)		
Social Security card		
Life insurance policies See Life Insurance (10B)		
Property titles or deeds See Property (Section 5)		
Vehicle titles See Vehicles (Section 6)		
Tax records (last 3 years) See Taxes and Accountant (7F)		
Military discharge papers (DD-214) See Other Government/Military Benefits (11E)		

Immediate Tasks Checklist (continued)

Document	Where It's Stored	Notes

TIPS FOR THIS PAGE

- Ensure your Leo Pouch contains copies of the most important documents.
- Note your preferred funeral home or service provider in After-Death Arrangements and Preferences.
- Confirm your executor knows where to find this kit, your will, and your safe or fireproof box.
- Review this list once a year to make sure all locations are still current.

FOR LOVED ONES — YOUR NEXT STEPS

- First 24 hours: contact immediate family, call the funeral home, secure the home and pets, and locate this kit and the will.
- Within 3–5 days: obtain multiple death certificates, plan services, contact the executor and attorney, notify employer.
- Within 1–2 weeks: file insurance and benefit claims, notify lenders, close or freeze accounts, cancel utilities and services.
- Forward mail to the executor and secure digital access (see Digital Life and Security).
- Track every action, call, and document in Executor Notes and Log (2D).

Related sections: Executor Notes and Log (2D) · Legal and Estate · After-Death Arrangements and Preferences

Executor Notes and Log

Use this page to identify your executor and key advisors, and to leave notes or instructions. Loved ones can also use this space to track contacts and actions as they work through the estate.

Executor Overview

Role	Name	Phone / Email	Notes
Executor			
Alternate executor			
Attorney			
Financial advisor			
Accountant / tax preparer			
Other key contact			

TIPS FOR THIS PAGE

- Let your executor know they have been named and where to find this kit.
- Review this section every year to confirm contacts and roles are current.
- You can keep a digital copy of the executor overview with your other secure digital backups.
- If you have a trust, confirm the trustee is listed separately — the executor and trustee may be different people.

FOR LOVED ONES — YOUR NEXT STEPS

- Write down every major call or email — name, date, confirmation number, and next steps.
- Keep copies of all forms, death certificates, and correspondence in your Leo Pouch.
- Use one line or note per action to make tracking easier.
- Contact the named executor as early as possible — they are authorized to act on the estate's behalf.

Related sections: People to Notify (2A) · Organizations and Accounts (2B) · Legal and Estate

Executor Notes and Log (continued)

Notes or Instructions for My Executor

Use this space for any personal or practical guidance — special account handling, donation preferences, priorities for communication, or anything else your executor should know.

Example: Please notify my employer before making any public announcement. My investment accounts at Vanguard should be reviewed with our financial advisor before any decisions are made...

3

Family and Dependents

Family structure, guardianship plans, pets, and care arrangements.

- 3A Family Overview 29
- 3B Guardianship Plans 31
- 3C Pets and Care Instructions 33
- 3D Caregivers / Non-Medical Assistance 35



Family Overview

Use this page to record family, dependents, and key relationships. Focus on the people most relevant for legal, financial, or care purposes — you can store a full extended list separately.

Immediate Family

Name	Relationship	Phone / Email	Notes

Dependents or Individuals You Support

Name	Relationship	Type of Support	Notes

Family Overview (continued)

Extended Family and Key Relationships

Name	Relationship	Phone / Email	Notes

TIPS FOR THIS PAGE

- Include only the relationships most relevant for legal, financial, or care purposes.
- List contact information that would still be valid several years from now.
- Note who should be contacted first for family updates or decision-making.
- Review this page annually or after major life events (marriage, divorce, birth, death).

FOR LOVED ONES — YOUR NEXT STEPS

- Use this page to identify who in the family needs to be notified or cared for.
- Cross-reference with People to Notify (2A) for the immediate notification list.
- For any dependents listed, follow up with Guardianship Plans (3B) to understand care wishes.
- Contact the people listed here early — they may have key information or responsibilities.

Related sections: People to Notify (2A) · Guardianship Plans (3B)

Guardianship Plans

Use this section to record care wishes for children, dependents, or anyone who relies on you. Note guardianship details from your will or trust and store copies in the Legal and Estate section. This page does not replace a legally valid will or estate plan — use it to organize and communicate key information.

Guardianship Overview

List each child or dependent and their current or designated guardian.

Person / Dependent	Designated Guardian	Relationship	Notes

Guardian Contact Details

Name	Relationship	Phone / Email	Legal Document or Location

TIPS FOR THIS PAGE

- Confirm legal guardianship in your will or trust — this page alone is not legally binding.
- Talk with potential guardians before naming them formally.
- Include backup or alternate guardians where possible.
- Keep addresses, phone numbers, and document locations up to date.
- Store guardianship paperwork in both your Leo Pouch and Legal and Estate folder.

Guardianship Plans (continued)

FOR LOVED ONES — YOUR NEXT STEPS

- Identify and contact the named guardian(s) as soon as possible and confirm availability.
- Review care preferences (schooling, routines, medical needs) with the guardian.
- Locate guardianship documents in Legal and Estate or the Leo Pouch and share copies as needed.
- If no guardian is named or available, contact an attorney immediately to protect the dependent.

Related sections: [Family Overview \(3A\)](#) · [Legal and Estate](#)

Additional Instructions or Notes

Describe preferences for schooling, medical care, living arrangements, or values you hope will guide your child's or dependent's care.

Example: Please keep our children in their current school district if at all possible. Our daughter has a nut allergy — her EpiPen is kept in her backpack at all times...

Pets and Care Instructions

Use this section to record your pets' care routines, vet contacts, medications, and preferred caregivers. If you have multiple pets, fill in one row per pet and add rows as needed.

Pet Overview

Pet Name	Type / Breed	Age	Notes (microchip, ID tag, special needs)

Care Information

Pet Name	Feeding Instructions	Daily Routine	Medications / Health Notes

Veterinary and Emergency Info

Vet / Clinic Name

Phone

Address

After-Hours / Emergency Instructions

Pets and Care Instructions (continued)

Preferred Caregiver(s)

Name	Relationship	Phone / Email	Notes

TIPS FOR THIS PAGE

- Make sure each pet's microchip and ID tags are current.
- Store vaccination records and adoption papers in your Leo Pouch.
- Add your vet's name to Emergency Info and Key Contacts (IC) for quick access.
- If you have multiple pets with very different routines, add a row per pet in the Care Information table.
- Let your designated caregiver know where this kit is kept.

FOR LOVED ONES — YOUR NEXT STEPS

- Provide immediate care first: locate pets, feed them, and ensure their safety.
- Contact the preferred caregiver or backup contacts listed here; involve the vet if there are medical concerns.
- Confirm long-term care arrangements using the will/trust and any caregiver agreement.
- Retrieve vaccination records and adoption papers from the Leo Pouch.

Related sections: Emergency Info and Key Contacts (IC) · Legal and Estate

Additional Notes

Anything else about your pets or their care that doesn't fit above.

Caregivers / Non-Medical Assistance

Use this section to list household helpers and services so loved ones can manage schedules, payments, or cancellations without guessing who to call.

Personal and Household Support

Name / Company	Role or Service	Phone / Email	Schedule / Notes

Professional or Contracted Services

Company / Provider	Service Type	Phone / Email	Schedule / Notes

Caregivers / Non-Medical Assistance (continued)

TIPS FOR THIS PAGE

- Include anyone who provides recurring or scheduled help, even informal arrangements like a neighbor or volunteer.
- Keep payment info and invoices in Finances — not here.
- For paid caregivers, note whether taxes or agencies are involved.
- Update this list whenever you change providers or discontinue a service.

FOR LOVED ONES — YOUR NEXT STEPS

- Contact caregivers listed here to notify them of changes and confirm upcoming appointments.
- Review contracts and payment schedules in Finances; note any refunds or deposits due.
- Decide which services to continue, cancel, or transfer based on current needs.
- Use Executor Notes and Log (2D) to track calls and cancellations.

Related sections: Executor Notes and Log (2D) · Finances

Additional Notes

Anything else about caregivers or support services that doesn't fit above.

4

Health and Medical

Medical providers, health insurance, medications, and advance directives.

- 4A Medical Overview 39
- 4B Providers and Pharmacies 41
- 4C Health Insurance 43
- 4D Advance Directives / Healthcare Power of Attorney 45



Medical Overview

Use this page to provide a quick snapshot of your medical history for emergencies. Focus on clarity over completeness — even partial notes help.

Health Snapshot

Category	Details
Blood type (if known)	
Height	
Weight	
Known conditions	
Allergies / reactions	
Medical devices or equipment	
Organ donor status	
Preferred hospital or clinic	
Notes	

Additional Health Information

Medical Overview (continued)

Current Medications

Medication Name	Dosage	Frequency	Prescribing Doctor	Notes / Purpose

TIPS FOR THIS PAGE

- Focus on clarity over completeness — even partial notes help.
- Update this page whenever medications or doctors change.
- Keep a copy of this page accessible for emergencies.
- Store insurance cards and prescription copies in your Leo Pouch.
- List online health portal access (e.g., MyChart) in the Notes field.

FOR LOVED ONES — YOUR NEXT STEPS

- In a health emergency: review this page for doctors, medications, and allergies. Call the primary physician or go to the preferred hospital listed. Bring the Leo Pouch with insurance and ID cards.
- After a passing: contact the physician and pharmacy to notify them. Request closure of medical and prescription accounts. Retrieve or safely dispose of any remaining medications.
- Review Advance Directives / Healthcare POA (4D) for power of attorney and directive paperwork.

Related sections: Emergency Info and Key Contacts (1C) · Providers and Pharmacies (4B) · Advance Directives / Healthcare POA (4D)

Providers and Pharmacies

Use this page to list your healthcare providers and pharmacies for easy reference. List the providers you see most often or those managing major conditions.

Healthcare Providers

Type	Name / Organization	Phone / Email	Address / Notes
Primary care physician			
Specialist			
Specialist			
Dentist			
Eye doctor			
Mental health provider			
Other provider			

Providers and Pharmacies (continued)

Pharmacies

Pharmacy Name	Phone	Address	Notes

TIPS FOR THIS PAGE

- List the providers you see most often or those managing major conditions.
- Include backup or mail-order pharmacies if you use online refill services.
- Update this list when changing doctors, insurance plans, or preferred pharmacies.
- Store appointment cards or provider summaries behind this page if helpful.

FOR LOVED ONES — YOUR NEXT STEPS

- Contact providers to notify them of the situation, review outstanding bills, and coordinate ongoing care if needed.
- Contact pharmacies to refill, cancel, or safely dispose of medications.
- Close or transfer online health portals (e.g., MyChart) once notifications are complete.

Related sections: Medical Overview (4A) · Emergency Info and Key Contacts (1C) · Health Insurance (4C)

Additional Notes

Anything else about your healthcare providers or pharmacies that doesn't fit above.

Health Insurance

Use this page to record medical insurance details for quick access. Keep a copy of each insurance card in your Leo Pouch.

Primary Health Insurance

Check In Leo Pouch once you have added a copy of the card or policy behind this page.

Provider / Company	Policy Number	Customer Service Phone	In Leo Pouch
			☐

Notes

Additional or Secondary Coverage

Check In Leo Pouch once you have added a copy of that card or policy.

Dental

In Leo Pouch ☐

Provider / Company	Policy #

Notes

Vision

In Leo Pouch ☐

Provider / Company	Policy #

Notes

Supplemental / Gap

In Leo Pouch ☐

Provider / Company	Policy #

Notes

Health Insurance (continued)

Medicare / Medicaid

In Leo Pouch ☐

Provider / Company

Policy #

Notes

COBRA and Survivor Coverage

Employer Coverage? (COBRA may apply)	HR / COBRA Contact	Est. Monthly Cost	Max Duration (18-36 mo.)	Alternative Coverage (marketplace, spouse, Medicare)	Notes

Health Savings Account (HSA)

HSA Custodian / Bank	Account Number (last 4)	Approximate Balance	Named Beneficiary

TIPS FOR THIS PAGE

- Check In Leo Pouch once you have added a copy of that card or policy.
- Keep only the most current coverage listed to avoid confusion.
- Include employer benefits details in your Employment and Income section.
- Update this section when you switch plans or carriers.
- COBRA enrollment must be elected within 60 days of losing coverage.

FOR LOVED ONES — YOUR NEXT STEPS

- Locate insurance cards and policies — check the Leo Pouch, this page, and Employment Benefits.
- Contact insurers to notify them and confirm any active coverage, pending claims, or benefits.
- Cancel or transfer coverage as appropriate and ensure any dependents have continued coverage.
- Contact HR within 60 days of death to request COBRA election paperwork for covered dependents — compare costs with marketplace plans at healthcare.gov first.
- Medicare-eligible survivors do not qualify for COBRA — they should contact Social Security for Medicare enrollment.

Related sections: Medical Overview (4A) · Providers and Pharmacies (4B) · Advance Directives / Healthcare POA (4D) · Medicare (11C)

Advance Directives / Healthcare POA

Use this section to record your healthcare decision documents and the people authorized to act on your behalf. Store originals in your Leo Pouch or safe; keep copies here for easy access.

A NOTE ON PROFESSIONAL ADVICE

- Advance directives and healthcare powers of attorney have specific legal requirements that vary by state. Recording your wishes here is a helpful starting point — make sure your formal documents are properly executed and that your healthcare provider and designated agent each have a copy.

Document Checklist

Check the In Leo Pouch column once you have a copy stored there.

Advance Directive

In Leo Pouch ☐

Location of Original

Notes

Healthcare Power of Attorney

In Leo Pouch ☐

Location of Original

Notes

Living Will (if separate)

In Leo Pouch ☐

Location of Original

Notes

Do Not Resuscitate (DNR) Order

In Leo Pouch ☐

Location of Original

Notes

Advance Directives / Healthcare POA (continued)

Healthcare Agent (Person You Have Designated)

Name	Relationship	Phone	Email

Alternate Agent (if Primary is Unavailable)

Name	Relationship	Phone	Email

TIPS FOR THIS PAGE

- Include copies here and note where originals are kept.
- Free templates and forms are available from hospitals, attorneys, or your state's health department.
- Share copies with your healthcare agent, primary care provider, and at least one family member.
- Review your choices every few years or after major life changes (surgery, new diagnosis, change in wishes).

FOR LOVED ONES — YOUR NEXT STEPS

- Locate documents: originals should be in the Leo Pouch or safe; copies may be behind this page.
- Contact the healthcare agent immediately and provide ID and documents as needed.
- If no agent is reachable, contact the alternate agent, then the primary physician.
- Return originals and update copies after use.

Related sections: Medical Overview (4A) · Legal and Estate

Additional Notes

Anything else about your advance directives or healthcare agents that doesn't fit above.

5

Property

Primary residence, vacation property, rentals, utilities, and home records.

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Primary Residence

Record the key details about your primary home — ownership, mortgage, and contacts. This page helps loved ones understand what you own, who to call, and where to find important documents.

Property Details

Street Address	City, State, ZIP	Ownership Type (own / rent / co-own)	Year Purchased or Lease Start
Purchase Price	Current Estimated Value	Parcel / Property ID (on tax bill)	Location of Deed or Lease

Mortgage or Rent

Lender / Landlord Name	Loan / Account Number	Customer Service Phone	Website / Portal
Monthly Payment	Payment Due Date	Estimated Payoff Date (or lease end)	Auto-Pay? (Y/N and account used)
			☐

HOA / Condo Association (if applicable)

Association Name	Contact Name	Phone	Email / Website	Monthly / Annual Fee	Location of HOA Documents

Key Contacts

Real Estate Agent	Agent Phone	Real Estate Attorney	Attorney Phone	Property Manager (if any)	Property Manager Phone

TIPS FOR THIS PAGE

- Store your deed, mortgage documents, and closing paperwork together — note the location here.
- If you rent, keep a copy of your lease and include your landlord's contact information.
- The parcel or property ID appears on your property tax bill and is needed to look up records.
- Update the estimated value when you refinance, sell nearby homes, or get an appraisal.
- Keep a recent mortgage statement behind this page — it has your loan number and the servicer's contact information in one place.

Primary Residence (continued)

FOR LOVED ONES — YOUR NEXT STEPS

- Confirm ownership status: check whether the home is owned, mortgaged, rented, or jointly held.
- Contact the mortgage lender immediately — they will need to be notified of the owner's death.
- Locate the deed or lease using the location noted above; an attorney may need to review it.
- If there is an HOA, notify them and ask about any fees, rules, or access procedures.

Related sections: Home Insurance (5E) · Property Taxes (5G) · Legal and Estate

Additional Notes

Anything else about this property that doesn't fit above.

Secondary / Vacation Property

If you own or regularly use a second home, vacation property, or cabin, record its details here. Leave blank if not applicable.

Property Details

Street Address	City, State, ZIP	Property Type (vacation home / cabin / condo / timeshare)
Ownership Type (own / co-own / timeshare)	Year Purchased	Current Estimated Value
Parcel / Property ID	Location of Deed	
Access / Key Information (codes, keybox, caretaker)		

Mortgage (if applicable)

Lender Name	Loan / Account Number	Customer Service Phone	Monthly Payment	Estimated Payoff Date	Auto-Pay? (Y/N and account used)
					☐

Property Manager / Caretaker

Name	Phone	Email	Notes (responsibilities, access, payment)

TIPS FOR THIS PAGE

- Note any access codes, keybox combinations, or caretaker arrangements — these are critical for loved ones.
- If this is a timeshare, include the management company name and your membership or contract number.
- Record any co-owners and their contact information in the Legal and Estate section.
- Check whether a separate insurance policy covers this property (see Home Insurance 5E).
- Keep a recent mortgage statement behind this page — it has your loan number and the servicer's contact information in one place.

Secondary / Vacation Property (continued)

FOR LOVED ONES — YOUR NEXT STEPS

- Secure the property: confirm access codes and contact the property manager or caretaker.
- Notify the mortgage lender if applicable.
- Check for any rental bookings or obligations that need to be honored or cancelled.
- Consult with an estate attorney about co-ownership or inherited property decisions.

Related sections: Primary Residence (5A) · Home Insurance (5E) · Property Taxes (5G) · Legal and Estate

Additional Notes

Anything else about this property that doesn't fit above.

Rental Property

Use this page to document any properties you own and rent to others. If you have more than one rental, use the notes area to list the rest. Leave blank if not applicable.

Rental Property Details

Property Address	City, State, ZIP	Number of Units	Parcel / Property ID	Location of Deed	Held in LLC or Trust? (name if yes)

Tenants

Tenant 1

Unit / Address	Tenant Name(s)	Phone
Lease Start	Lease End	Monthly Rent
Security Deposit Held		

Notes

Tenant 2

Unit / Address	Tenant Name(s)	Phone
Lease Start	Lease End	Monthly Rent
Security Deposit Held		

Notes

Rental Property (continued)

Tenant 3

Unit / Address

Tenant Name(s)

Phone

Lease Start

Lease End

Monthly Rent

Security Deposit Held

Notes

Property Manager (if applicable)

Company / Name

Phone

Email

Management
Fee

Contract Location

Rental Finances

Mortgage Lender

Loan / Account Number

Monthly Mortgage
PaymentTotal Monthly Rental
IncomeAccountant / Tax
Preparer for Rental

TIPS FOR THIS PAGE

- Keep signed lease agreements together and note their location here.
- If a property manager handles day-to-day operations, make sure they know to contact your family.
- Note any security deposits held and where those funds are kept — tenants are entitled to their return.
- If the property is held in an LLC or trust, an attorney will need to be involved in any transfers.

FOR LOVED ONES — YOUR NEXT STEPS

- Contact the property manager immediately to ensure continued management and tenant communication.
- Do not change tenant arrangements until consulting with an estate attorney.
- Locate lease agreements and confirm security deposit accounts.
- Notify the mortgage lender and continue payments to avoid default during estate settlement.

Related sections: Primary Residence (5A) · Home Insurance (5E) · Property Taxes (5G) · Income and Assets · Legal and Estate

Utilities and Home Services

List the services connected to your home — utilities, internet, security, and regular household providers. This helps loved ones keep essential services running or cancel them without delay.

Utilities and Services

Electric

☐ Auto-Pay

Provider / Company	Account Number	Phone / Website	Notes

Gas / Heating Oil

☐ Auto-Pay

Provider / Company	Account Number	Phone / Website	Notes

Water / Sewer

☐ Auto-Pay

Provider / Company	Account Number	Phone / Website	Notes

Trash / Recycling

☐ Auto-Pay

Provider / Company	Account Number	Phone / Website	Notes

Internet

☐ Auto-Pay

Provider / Company	Account Number	Phone / Website	Notes

Cable / Satellite TV

☐ Auto-Pay

Provider / Company	Account Number	Phone / Website	Notes

Home Phone

☐ Auto-Pay

Provider / Company	Account Number	Phone / Website	Notes

Utilities and Home Services (continued)

Security / Alarm System

☐ Auto-Pay

Provider / Company	Account Number	Phone / Website	Notes

Lawn / Snow Removal

☐ Auto-Pay

Provider / Company	Account Number	Phone / Website	Notes

Pest Control

☐ Auto-Pay

Provider / Company	Account Number	Phone / Website	Notes

Cleaning Service

☐ Auto-Pay

Provider / Company	Account Number	Phone / Website	Notes

Pool / Hot Tub Service

☐ Auto-Pay

Provider / Company	Account Number	Phone / Website	Notes

TIPS FOR THIS PAGE

- Include account numbers so loved ones can call providers and identify the account without a password.
- Keep a recent bill or statement for each service behind this page — it covers the account number, provider phone number, and typical charges without you having to write it all in.
- Note any services on auto-pay — these will continue to charge until cancelled.
- For alarm systems, include the monitoring company, account number, and verbal security code.
- Services like trash and water may require the estate to formally transfer or cancel the account.
- Individual streaming apps (Netflix, etc.) are tracked separately — see 12C.

FOR LOVED ONES — YOUR NEXT STEPS

- Keep essential utilities (electric, water, heat) active until the home is sold or transferred.
- Cancel discretionary services (cable/satellite TV, pest control, cleaning) to stop ongoing charges.
- Contact the alarm company immediately — monitoring fees continue and access codes may need updating.
- Check for auto-pay charges on credit cards or bank accounts and cancel each service directly.

Related sections: Primary Residence (5A) · Bills and Subscriptions (7C) · Subscriptions, Online Presence and Protection (12C)

Home Insurance

Record your homeowner's, renter's, and any additional property insurance policies here. In an emergency, loved ones need this information quickly.

Homeowner's or Renter's Insurance

Insurance Company	Policy Number
Claims / 24-Hour Phone	Renewal Date
Deductible	Location of Policy Documents

Additional Property Policies

Include flood, earthquake, umbrella, or policies for secondary / rental properties.

Flood Insurance

Insurance Company	Policy Number	Claims Phone	Annual Premium
Notes			

Earthquake Insurance

Insurance Company	Policy Number	Claims Phone	Annual Premium
Notes			

Umbrella / Excess Liability

Insurance Company	Policy Number	Claims Phone	Annual Premium
Notes			

Home Insurance (continued)

Rental Property

Insurance Company	Policy Number	Claims Phone	Annual Premium

Notes

Valuable Items / Scheduled Personal Property

Insurance Company	Policy Number	Claims Phone	Annual Premium

Notes

TIPS FOR THIS PAGE

- Keep a copy of your policy declarations page in the Leo Pouch — this is the one-page summary of coverage.
- Document high-value items (jewelry, art, collectibles) separately with a rider or floater policy.
- Review coverage amounts annually — rebuilding costs often exceed original purchase price.
- If you rent, renter's insurance covers your belongings; your landlord's policy does not.

FOR LOVED ONES — YOUR NEXT STEPS

- Call the claims line immediately after any loss or damage — even before cleanup begins.
- Do not dispose of damaged property until an adjuster has documented it.
- The policy may cover temporary housing if the home is uninhabitable.
- Notify the insurer of the policyholder's death; the policy may need to be updated or rewritten.

Related sections: Primary Residence (5A) · Secondary Property (5B) · Rental Property (5C) · Insurance

Additional Notes

Anything else about your home insurance that doesn't fit above.

Maintenance and Repairs

Keep a record of the people and companies you rely on for home upkeep, plus warranties and appliances. This gives loved ones or a future owner a head start on managing the home.

Service Providers and Contractors

Service / Trade	Company / Name	Phone	Last Used	Notes
HVAC / Heating & Cooling				
Plumber				
Electrician				
Roofer				
Landscaper / Lawn Care				
Snow Removal				
Pest Control				
Handyman / General Repairs				
House Cleaner				
Painter				
Gutter Cleaning				
Chimney / Fireplace				

Maintenance and Repairs (continued)

Appliances and Warranties

Appliance / System	Brand / Model	Purchase Date	Warranty Expires	Notes / Service Info
HVAC / Furnace				
Water Heater				
Refrigerator				
Washer / Dryer				
Dishwasher				
Oven / Range				
Roof (last replaced)				

TIPS FOR THIS PAGE

- Update this list when you hire a new contractor you trust — your recommendation will help loved ones.
- Appliance manuals and warranty cards are often stored with the appliance or in a home files folder.
- Note the location of your main water shutoff, electrical panel, and gas shutoff — critical in emergencies.
- Major improvements (roof, HVAC, kitchen remodel) may increase home value — note the year and cost.

FOR LOVED ONES — YOUR NEXT STEPS

- Use the service provider list to find trusted help quickly — these contractors know the home.
- Check active warranties before paying for repairs on covered appliances or systems.
- Locate the water shutoff, electrical panel, and gas shutoff as soon as possible.

Related sections: Primary Residence (5A) · Utilities and Home Services (5D) · Home Insurance (5E)

Property Taxes

Record your property tax details for each property you own. Unpaid property taxes can lead to liens or penalties, so this information is important for loved ones managing your estate.

Primary Residence — Property Taxes

County / Municipality	Parcel / Property ID	Assessed Value (most recent)
Annual Tax Amount	Payment Due Date(s)	Payment Method (online / escrow / check)
Escrowed with Mortgage?	Tax Authority Website	Exemptions Applied (homestead, senior, veteran, etc.)
☐		

Additional Properties

List secondary, rental, or vacation properties here.

Property 1

Property Address	Parcel / Property ID
County / Municipality	Annual Tax
Due Date(s)	Payment Method
Notes	

Property Taxes (continued)

Property 2

Property Address	Parcel / Property ID
County / Municipality	Annual Tax
Due Date(s)	Payment Method
Notes	

Property 3

Property Address	Parcel / Property ID
County / Municipality	Annual Tax
Due Date(s)	Payment Method
Notes	

TIPS FOR THIS PAGE

- If taxes are escrowed with your mortgage, the lender pays them — confirm this with your lender.
- Check whether you qualify for exemptions such as homestead, senior citizen, disability, or veteran discounts.
- Keep your most recent tax bill behind this page — it shows the parcel ID, assessed value, and payment history.
- Property tax deadlines vary by state; missing them can result in late fees or liens on the property.

FOR LOVED ONES — YOUR NEXT STEPS

- Confirm whether property taxes are escrowed with the mortgage or paid directly.
- Pay any outstanding or upcoming taxes to avoid penalties — these become the estate's responsibility.
- Contact the county assessor to notify them of the owner's death and ask about any required transfers.
- Ask an estate attorney whether any exemptions need to be updated or re-applied after transfer.

Related sections: Primary Residence (5A) · Secondary Property (5B) · Rental Property (5C) · Legal and Estate

6

Vehicles

Vehicle details, titles, insurance, and service records.

6A	Vehicle 1	65
6B	Vehicle 2	67
6C	Vehicle 3	69
6D	Other Vehicles	71



Vehicle 1

Record the details for your primary vehicle — registration, loan, and insurance. Keep the title and insurance card in your Leo Pouch or glove compartment.

Vehicle Details

Year	Make	Model / Trim
Color	VIN (Vehicle Identification Number)	License Plate Number
Registration State	Title Owner(s)	Location of Title

Registration

Registration Expiration	Where to Renew (DMV website / office)	Annual Renewal Cost

Auto Loan (if applicable)

Lender / Financing Company	Loan / Account Number	Customer Service Phone	Monthly Payment	Auto-Pay? (Y/N and account used)	Estimated Payoff Date (or Paid Off)
				☐	

Vehicle 1 (continued)

Auto Insurance
For a consolidated view across all your vehicles, see Auto Insurance (10G).

Insurance Company	Policy Number	Agent Name
Agent Phone	Claims / 24-Hour Phone	Roadside Assistance Number
Policy Renewal Date		

TIPS FOR THIS PAGE

- Keep a copy of your insurance card in the glove compartment and one in the Leo Pouch.
- The VIN is on the dashboard (driver's side) and on the title — it is needed to transfer ownership.
- If the vehicle has an auto loan, the lender holds the title until it is paid off.
- Record the roadside assistance number separately — it is useful in emergencies before insurance is needed.

FOR LOVED ONES — YOUR NEXT STEPS

- Locate the title — if a loan is outstanding, contact the lender about the process for payoff or transfer.
- Do not sell or transfer the vehicle until the estate is settled unless advised by an attorney.
- Notify the insurance company of the owner's death to update or cancel coverage.
- Continue making loan payments if the vehicle will be kept, to avoid repossession.

Related sections: Vehicle 2 (6B) · Vehicle 3 (6C) · Insurance

Additional Notes

Anything else about this vehicle that doesn't fit above.

Vehicle 2

Record the details for a second vehicle. Leave blank if not applicable.

Vehicle Details

Year	Make	Model / Trim
Color	VIN (Vehicle Identification Number)	License Plate Number
Registration State	Title Owner(s)	Location of Title

Registration

Registration Expiration	Where to Renew (DMV website / office)	Annual Renewal Cost

Auto Loan (if applicable)

Lender / Financing Company	Loan / Account Number	Customer Service Phone	Monthly Payment	Auto-Pay? (Y/N and account used)	Estimated Payoff Date (or Paid Off)
				☐	

Vehicle 2 (continued)

Auto Insurance
For a consolidated view across all your vehicles, see Auto Insurance (10G).

Insurance Company	Policy Number	Agent Name
Agent Phone	Claims / 24-Hour Phone	Roadside Assistance Number
Policy Renewal Date		

TIPS FOR THIS PAGE

- Keep a copy of your insurance card in the glove compartment and one in the Leo Pouch.
- The VIN is on the dashboard (driver's side) and on the title — it is needed to transfer ownership.
- If the vehicle has an auto loan, the lender holds the title until it is paid off.
- If this vehicle is shared or co-owned, note the co-owner's name and contact information in the title field.

FOR LOVED ONES — YOUR NEXT STEPS

- Locate the title — if a loan is outstanding, contact the lender about the process for payoff or transfer.
- Do not sell or transfer the vehicle until the estate is settled unless advised by an attorney.
- Notify the insurance company of the owner's death to update or cancel coverage.
- Continue making loan payments if the vehicle will be kept, to avoid repossession.

Related sections: Vehicle 1 (6A) · Vehicle 3 (6C) · Insurance

Additional Notes

Anything else about this vehicle that doesn't fit above.

Vehicle 3

Record the details for a third vehicle. Leave blank if not applicable.

Vehicle Details

Year	Make	Model / Trim
Color	VIN (Vehicle Identification Number)	License Plate Number
Registration State	Title Owner(s)	Location of Title

Registration

Registration Expiration	Where to Renew (DMV website / office)	Annual Renewal Cost

Auto Loan (if applicable)

Lender / Financing Company	Loan / Account Number	Customer Service Phone	Monthly Payment	Auto-Pay? (Y/N and account used)	Estimated Payoff Date (or Paid Off)
				☐	

Vehicle 3 (continued)

Auto Insurance
For a consolidated view across all your vehicles, see Auto Insurance (10G).

Insurance Company	Policy Number	Agent Name
Agent Phone	Claims / 24-Hour Phone	Roadside Assistance Number
Policy Renewal Date		

TIPS FOR THIS PAGE

- Keep a copy of your insurance card in the glove compartment and one in the Leo Pouch.
- The VIN is on the dashboard (driver's side) and on the title — it is needed to transfer ownership.
- If the vehicle has an auto loan, the lender holds the title until it is paid off.
- If this vehicle is shared or co-owned, note the co-owner's name and contact information in the title field.

FOR LOVED ONES — YOUR NEXT STEPS

- Locate the title — if a loan is outstanding, contact the lender about the process for payoff or transfer.
- Do not sell or transfer the vehicle until the estate is settled unless advised by an attorney.
- Notify the insurance company of the owner's death to update or cancel coverage.
- Continue making loan payments if the vehicle will be kept, to avoid repossession.

Related sections: Vehicle 1 (6A) · Vehicle 2 (6B) · Insurance

Additional Notes

Anything else about this vehicle that doesn't fit above.

Other Vehicles

Record motorcycles, boats, RVs, ATVs, trailers, or any other vehicles or watercraft you own. Each has its own title, registration, and insurance requirements. Leave blank if not applicable.

Other Vehicles and Watercraft

Item 1

Type	Year / Make / Model	VIN / Serial / HIN
Plate or Registration #	Title Location	Insurance Company
Policy Number	Loan / Lender (if any)	
Notes		

Item 2

Type	Year / Make / Model	VIN / Serial / HIN
Plate or Registration #	Title Location	Insurance Company
Policy Number	Loan / Lender (if any)	
Notes		

Other Vehicles (continued)

Item 3

Type	Year / Make / Model	VIN / Serial / HIN
Plate or Registration #	Title Location	Insurance Company
Policy Number	Loan / Lender (if any)	

Notes

Item 4

Type	Year / Make / Model	VIN / Serial / HIN
Plate or Registration #	Title Location	Insurance Company
Policy Number	Loan / Lender (if any)	

Notes

TIPS FOR THIS PAGE

- Boats and watercraft have a Hull Identification Number (HIN) instead of a VIN — note it in the VIN / Serial / HIN field.
- RVs may have both a vehicle title and a separate recreational vehicle registration.
- Some states require trailers to be registered separately — check with your DMV.
- Storage locations (marina, storage unit, garage) should be noted so loved ones can secure the vehicle.
- Keep a copy of each vehicle's insurance card and registration behind this page.

FOR LOVED ONES — YOUR NEXT STEPS

- Each vehicle requires its own title transfer — do not assume one process covers all vehicles.
- Locate all titles and confirm which vehicles have outstanding loans.
- Notify each insurance company to update or cancel coverage and stop ongoing premiums.
- Check for storage or marina fees that may continue to accrue — cancel or continue as appropriate.

Related sections: [Vehicle 1 \(6A\)](#) · [Vehicle 2 \(6B\)](#) · [Vehicle 3 \(6C\)](#) · [Insurance](#)

7

Finances

Bank accounts, credit cards, bills, loans, and taxes — a complete picture of your financial life.

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7D Loans / Lines of Credit	81
7E Debt Tracker / Payoff Summary	83
7F Taxes and Accountant	85

This section is for reference and organization only — not legal, financial, or medical advice. Consult a qualified professional for your specific situation.



Bank Accounts

Use this section as a master list of all your active bank accounts across every bank or credit union. Keep a current statement or summary page for each account behind this sheet.

Active Bank Accounts

Account 1 Autopay ☐

Bank Name	Account Type	Account Number (Last 4)
Joint Holder(s)	POD Beneficiary	
Notes		

Account 2 Autopay ☐

Bank Name	Account Type	Account Number (Last 4)
Joint Holder(s)	POD Beneficiary	
Notes		

Account 3 Autopay ☐

Bank Name	Account Type	Account Number (Last 4)
Joint Holder(s)	POD Beneficiary	
Notes		

Bank Accounts (continued)

Account 4 Autopay ☐

Bank Name	Account Type	Account Number (Last 4)
Joint Holder(s)	POD Beneficiary	

Notes

Account 5 Autopay ☐

Bank Name	Account Type	Account Number (Last 4)
Joint Holder(s)	POD Beneficiary	

Notes

TIPS FOR THIS PAGE

- Include every bank or credit union account, even those used rarely.
- Payable-on-Death (POD) designations let an account pass directly to a beneficiary outside of probate — most banks and credit unions let you add one for free.
- Store one recent statement or online summary per account behind this page for easy reference.
- Record online access details in Digital Life and Security.
- Keep copies of statements in your Leo Pouch if space allows.
- Review and update this list annually.

FOR LOVED ONES — YOUR NEXT STEPS

- Locate accounts, review statements, and confirm access details (Digital Life and Security).
- Notify banks, provide required documents, and review account status (joint, POD, safe-deposit); restrict activity if needed.
- Transfer or close accounts, keep records in Executor Notes and Log, and update any linked autopay (Bills and Subscriptions).

Related sections: Bills and Subscriptions · Legal Snapshot

Credit Cards

Use this section as a master list of all active credit cards. Keep a recent statement for each to track balances and help close or transfer accounts if needed.

Active Credit Cards

Card 1 Autopay ☐

Issuer / Bank	Card Type
Last 4 Digits	Linked Account
Notes	

Card 2 Autopay ☐

Issuer / Bank	Card Type
Last 4 Digits	Linked Account
Notes	

Card 3 Autopay ☐

Issuer / Bank	Card Type
Last 4 Digits	Linked Account
Notes	

Credit Cards (continued)

Card 4

Autopay ☐

Issuer / Bank

Card Type

Last 4 Digits

Linked Account

Notes

Card 5

Autopay ☐

Issuer / Bank

Card Type

Last 4 Digits

Linked Account

Notes

TIPS FOR THIS PAGE

- Include all personal, business, and store credit cards that are in your name.
- Keep one current statement for each card behind this page.
- Record login details or two-factor access in Digital Life and Security.
- Note which checking account each card is linked to for payments.
- Review this list yearly and close inactive cards to simplify finances.

FOR LOVED ONES — YOUR NEXT STEPS

- Locate statements, access details (Digital Life and Security), and review recurring charges.
- Contact issuers, provide documents, and confirm closure or transfer.
- Keep records in Executor Notes and Log, update autopays (Bills and Subscriptions), and notify credit bureaus if needed.

Related sections: Bank Accounts

Bills and Subscriptions

Use this section to track recurring bills, memberships, and subscriptions. Keep a recent statement for each item behind this page for reference.

Active Bills and Subscriptions

Service or Provider	Category	Account # (Last 4)	Payment Method	Amount / Frequency	Notes

Bills and Subscriptions (continued)

Service or Provider	Category	Account # (Last 4)	Payment Method	Amount / Frequency	Notes

TIPS FOR THIS PAGE

- Include cell phone, memberships, streaming, and software subscriptions.
- Mark whether each item is set to autopay or billed manually.
- Keep one billing statement or renewal email behind this page for each major service.
- Record online access details in Digital Life and Security.
- Review this list at least twice a year or after major life changes.

FOR LOVED ONES — YOUR NEXT STEPS

- Locate services, statements, and access details (Digital Life and Security).
- Pause or cancel payments, and transfer essential services if needed.
- Keep confirmations in Executor Notes and Log, update linked accounts (Bank Accounts and Credit Cards), and check subscriptions.

Related sections: Insurance · Utilities and Home Services · Subscriptions, Online Presence, and Protection

Loans / Lines of Credit

Use this section to record all active loans and credit lines not listed elsewhere. Keep a current statement or payoff summary for each account behind this page.

Active Loans and Credit Lines

Loan 1

Lender / Institution	Type of Loan	Account # (Last 4)
Monthly Payment	Payment Method	
Notes		

Loan 2

Lender / Institution	Type of Loan	Account # (Last 4)
Monthly Payment	Payment Method	
Notes		

Loan 3

Lender / Institution	Type of Loan	Account # (Last 4)
Monthly Payment	Payment Method	
Notes		

Loans / Lines of Credit (continued)

Loan 4

Lender / Institution	Type of Loan	Account # (Last 4)
Monthly Payment	Payment Method	

Notes

TIPS FOR THIS PAGE

- Include all personal, student, and home equity loans, as well as any open credit lines.
- Mortgages are detailed separately in Primary Residence and Rental Property.
- Note whether each account is on autopay and from which bank (Bank Accounts).
- Keep one current statement or payoff letter behind this page.
- Record online access info in Digital Life and Security.
- Review this list once a year or after paying off a major loan.

FOR LOVED ONES — YOUR NEXT STEPS

- Locate loan details, statements, and access info (Digital Life and Security).
- Notify lenders, provide documents, and request payoff details.
- Record outcomes in Executor Notes and Log, stop autopay (Bank Accounts and Bills and Subscriptions), and update Debt Tracker / Payoff Summary.

Related sections: Bank Accounts · Debt Tracker / Payoff Summary

Additional Notes

Anything else about your loans or credit lines that doesn't fit above.

Debt Summary

Debt Tracker / Payoff Summary (continued)

Lender / Institution	Type of Loan	Starting Balance	Current Balance	Interest Rate	Monthly Payment	Target Payoff Date

TIPS FOR THIS PAGE

- Use this table as a snapshot of all open loans and credit lines from Loans / Lines of Credit.
- Update balances once or twice a year or after major payoffs.
- Highlight or mark paid-off accounts to show progress.
- Keep your most recent loan statements behind this page or in the Leo Pouch.
- Record online access details in Digital Life and Security.
- Review this section during annual financial checkups or tax preparation.

FOR LOVED ONES — YOUR NEXT STEPS

- Compare statements, confirm balances or payoffs, and cross-check Loans / Lines of Credit.
- Notify lenders, request payoff or closure details, and keep records in Executor Notes and Log.
- Mark accounts paid or closed, keep documents, and cancel autopay (Bank Accounts and Bills and Subscriptions).

Related sections: Loans / Lines of Credit · Bank Accounts

Taxes and Accountant

Use this section to track tax details, contacts, and filings, so you and your loved ones can easily find key documents.

Tax Summary

Primary tax preparer / accountant

Firm / company name

Address

Phone / email

Typical filing date (month / day)

Tax year most recently filed

Filing method (online, mail, accountant, etc.)

Notes

Annual Filing Record

Tax Year	Filed By	Date Filed	Refund / Amount Owed	Payment Method	Notes

TIPS FOR THIS PAGE

- Keep at least 3 years of tax returns and W-2s or 1099s behind this page (the IRS’s general audit window) – longer if you have unreported income, a bad debt or worthless securities claim, or unfiled returns.
- Store digital copies of returns in your Digital Vault or with your accountant.
- List all states filed if you work or own property in more than one.
- Note any recurring tax payments or estimated quarterly payments.
- Review this section every tax season to stay current.

Taxes and Accountant (continued)

FOR LOVED ONES — YOUR NEXT STEPS

- Locate tax documents (returns, W-2s/1099s) in this section, the Leo Pouch, or digital storage.
- Contact the accountant to notify them and confirm required filings.
- Handle outstanding items, ensure payments, and keep records in Executor Notes and Log.

Related sections: Bank Accounts · Legal and Estate

Additional Notes

Anything else about your taxes or accountant that doesn't fit above.

8

Income and Assets

Employment, freelance income, retirement accounts, investments, and business interests.

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Employment and Income

Record your employer details and payroll information. This helps loved ones contact your employer, confirm final pay, and understand what benefits or obligations are tied to your job.

Primary Employer

Employer / Company Name	Work Address	Job Title
Start Date	Employment Type (full-time / part-time / contract)	HR Contact Name
HR Phone	HR Email	Direct Manager / Supervisor
Manager Phone / Email		

Payroll Details

Pay Frequency (weekly / biweekly / monthly)	Gross Pay per Period	Net Pay per Period (approximate)
Direct Deposit Account (bank / last 4 digits)	Payroll Company (e.g. ADP, Paychex)	Payroll Portal / Website
Where to Find W-2s or Pay Stubs		

Additional Jobs or Income Sources

For part-time work, second jobs, or seasonal employment. For freelance income, see Freelance / Side Income (8B).

Employer / Source	Role / Description	Approximate Pay	Frequency	Contact / Phone	Notes

Employment and Income (continued)

Employer / Source	Role / Description	Approximate Pay	Frequency	Contact / Phone	Notes

TIPS FOR THIS PAGE

- Note your HR contact — they handle final pay, benefits continuation, and COBRA paperwork.
- If you have a pension or profit-sharing plan, ask HR for the plan administrator's contact.
- Accrued vacation or PTO may be paid out upon death or termination — your employer can confirm.
- If you work remotely or use a company laptop, note where work equipment is kept.

FOR LOVED ONES — YOUR NEXT STEPS

- Call HR as soon as possible — they coordinate final paycheck, benefits end dates, and life insurance claims.
- Ask HR about any survivor benefits, pension continuation, or group life insurance payout process.
- Return company equipment and access badges; HR will guide you on the offboarding process.
- Check for outstanding expense reimbursements or equity vesting that may be owed to the estate.

Related sections: Employment Benefits (8C) · Retirement Accounts (8D) · Finances

Additional Notes

Anything else about your employment or income that doesn't fit above.

Freelance / Side Income

Document any self-employment, freelance work, consulting, gig income, or side businesses. This helps loved ones understand ongoing income streams, outstanding invoices, and tax obligations. Leave blank if not applicable.

Income Sources

Source 1

Active Contract? ☐

Client / Platform / Source	Type of Work	Approx. Monthly Income
How Paid (check / ACH / PayPal / etc.)	Contact Name / Email	
Notes		

Source 2

Active Contract? ☐

Client / Platform / Source	Type of Work	Approx. Monthly Income
How Paid (check / ACH / PayPal / etc.)	Contact Name / Email	
Notes		

Source 3

Active Contract? ☐

Client / Platform / Source	Type of Work	Approx. Monthly Income
How Paid (check / ACH / PayPal / etc.)	Contact Name / Email	
Notes		

Freelance / Side Income (continued)

Business / Self-Employment Details

Business / DBA Name (if any)

EIN (Employer Identification Number)

Business Structure (sole prop / LLC / S-corp / etc.)

Business Bank Account (institution / last 4)

Invoicing Tool (QuickBooks / FreshBooks / etc.)

Accountant / Tax Preparer

Accountant Phone / Email

Quarterly Taxes? Due Dates / Notes

Notes

Outstanding invoices, recurring clients, active projects, or anything a loved one would need to know.

e.g. Invoice #142 for \$3,200 is outstanding with Acme Corp (due Jan 15). Monthly retainer with Smith Design ends April. Tax estimated payments due Jan, April, June, Sept...

TIPS FOR THIS PAGE

- Note any outstanding invoices so loved ones can follow up on money owed to your estate.
- If you pay quarterly estimated taxes, list the due dates so payments are not missed.
- Active contracts may have termination clauses — an attorney should review before cancelling.
- Business income and expenses are reported separately from personal income — note your accountant's contact.

FOR LOVED ONES — YOUR NEXT STEPS

- Review active contracts to understand obligations — do not cancel without legal guidance.
- Follow up on outstanding invoices; money owed to the person is an asset of the estate.
- Contact the accountant to understand any pending tax filings or payments.
- If there is a business bank account, work with the estate attorney to manage access and closure.

Related sections: Employment and Income (8A) · Business Ownership / Equity (8F) · Taxes and Accountant (7F)

Employment Benefits

Document the benefits your employer provides. This page helps loved ones identify life insurance proceeds, continue health coverage under COBRA, and understand what may be owed to the estate.

Benefits Administration

HR / Benefits Contact Name	HR Phone	HR Email	Benefits Portal / Website	Open Enrollment Period

Benefits Summary

Benefit Type	Provider / Plan Name	Coverage Level / Details	Employee Contribution / Month	Notes / Account Number
Health Insurance				
Dental Insurance				
Vision Insurance				
Group Life Insurance				
Supplemental Life Insurance				
Short-Term Disability				
Long-Term Disability				
FSA (Flexible Spending Account)				
HSA (Health Savings Account)				
401(k) / 403(b)				
Pension / Defined Benefit Plan				

Employment Benefits (continued)

Benefit Type	Provider / Plan Name	Coverage Level / Details	Employee Contribution / Month	Notes / Account Number
Stock Options / RSUs / ESPP				
Commuter / Transit Benefits				
Tuition / Education Assistance				

TIPS FOR THIS PAGE

- Group life insurance through work is often 1-2x your salary — check your coverage amount and beneficiary.
- COBRA allows survivors or dependents to continue health coverage for up to 36 months — HR provides paperwork.
- If you have an HSA, funds belong to you and transfer to your estate or beneficiary.
- Unvested stock options or RSUs may be accelerated upon death — check your plan documents.
- Keep your latest benefits enrollment summary behind this page — it lists your coverage elections and beneficiaries in one place.

FOR LOVED ONES — YOUR NEXT STEPS

- Contact HR immediately to ask about group life insurance, survivor benefits, and final paycheck.
- Request COBRA paperwork if dependents need continued health coverage — there is a deadline to enroll.
- Ask about any pension, 401(k), or profit-sharing balance and the beneficiary on file.
- Inquire about accrued PTO payout and any unvested equity that may be owed to the estate.

Related sections: Employment and Income (8A) · Retirement Accounts (8D) · Health Insurance (4C) · Insurance

Additional Notes

Anything else about your employment benefits that doesn't fit above.

Retirement Accounts

List your retirement accounts and the beneficiaries on file. Beneficiary designations on retirement accounts override a will – keeping them current is one of the most important things you can do.

Retirement Accounts 401(k)

Institution / Custodian	Account Number (last 4)	Customer Service Phone
Approx. Balance	Primary Beneficiary	Contingent Beneficiary
Notes		

Traditional IRA

Institution / Custodian	Account Number (last 4)	Customer Service Phone
Approx. Balance	Primary Beneficiary	Contingent Beneficiary
Notes		

Roth IRA

Institution / Custodian	Account Number (last 4)	Customer Service Phone
Approx. Balance	Primary Beneficiary	Contingent Beneficiary
Notes		

Retirement Accounts (continued)

403(b)

Institution / Custodian	Account Number (last 4)	Customer Service Phone
Approx. Balance	Primary Beneficiary	Contingent Beneficiary

Notes

Financial Advisor / Planner

Advisor Name	Firm / Company	Phone	Email	Notes

TIPS FOR THIS PAGE

- Beneficiary designations on retirement accounts override your will – review them after any major life change.
- Name both a primary and contingent (backup) beneficiary on every account.
- Required Minimum Distributions (RMDs) begin at age 73 for most accounts – note if you are taking them.
- A spouse who inherits an IRA has different options than a non-spouse – an advisor can explain the choices.
- Keep a recent statement for each account behind this page – it shows the balance and confirms the beneficiary on file.

FOR LOVED ONES – YOUR NEXT STEPS

- Contact each institution directly with a death certificate – retirement accounts pass by beneficiary designation, not the will.
- Do not withdraw funds until you speak with a financial advisor about inherited IRA rules and tax implications.
- Ask about the 10-year rule for non-spouse beneficiaries, which requires accounts to be distributed within 10 years.
- Pension plans may offer survivor benefits – contact the plan administrator to learn what is available.

Related sections: [Employment Benefits \(8C\)](#) · [Other Investments \(8E\)](#) · [Beneficiary Designations \(9E\)](#) · [Legal and Estate](#)

Additional Notes

Anything else about your retirement accounts that doesn't fit above.

Other Investments / Brokerage Accounts

List non-retirement investment accounts, brokerage accounts, savings bonds, and other financial assets. Include the institution and beneficiary or transfer-on-death (TOD) designation where applicable.

Investment and Brokerage Accounts

Individual Brokerage Account

Institution / Brokerage	Account Number (last 4)	Phone / Website
Approx. Value	TOD / Beneficiary	Advisor (if any)
Notes		

Joint Brokerage Account

Institution / Brokerage	Account Number (last 4)	Phone / Website
Approx. Value	TOD / Beneficiary	Advisor (if any)
Notes		

529 College Savings Plan

Institution / Brokerage	Account Number (last 4)	Phone / Website
Approx. Value	TOD / Beneficiary	Advisor (if any)
Notes		

Other Investments / Brokerage Accounts (continued)

Cryptocurrency

Institution / Brokerage	Account Number (last 4)	Phone / Website
Approx. Value	TOD / Beneficiary	Advisor (if any)

Notes

Notes

Any investment accounts held in a trust, jointly, or with special instructions.

e.g. Joint brokerage with [name] passes automatically. Savings bonds are in the safe — Series EE purchased 2005. Crypto held in hardware wallet in desk drawer, passphrase in Leo Pouch...

TIPS FOR THIS PAGE

- Transfer-on-Death (TOD) designations let accounts pass directly to a beneficiary outside of probate.
- Jointly held accounts typically pass to the surviving owner by right of survivorship.
- Cryptocurrency passes only if loved ones have access to the wallet and private key — document this carefully.
- 529 plans have a named beneficiary; unused funds can be rolled over to a sibling or other family member.
- Keep a recent statement for each account behind this page — it shows the balance and confirms the TOD/beneficiary on file.

FOR LOVED ONES — YOUR NEXT STEPS

- Contact each brokerage with a death certificate to initiate account transfer or closure.
- Check for TOD designations — these accounts pass directly without going through the will.
- Locate any paper savings bonds and bring them to a bank or Treasury Direct to redeem or transfer.
- Cryptocurrency requires the private key or seed phrase — without it, access may be permanently lost.

Related sections: Retirement Accounts (8D) · Business Ownership / Equity (8F) · Beneficiary Designations (9E) · Legal and Estate

Business Ownership / Equity

If you own or co-own a business, have equity in a private company, or hold partnership interests, document the key details here. Business succession is complex — your loved ones will need professional guidance quickly. Leave blank if not applicable.

Business Details

Business Name

Business Structure (LLC / S-corp / C-corp / Partnership / Sole Prop)

EIN (Employer Identification Number)

Your Ownership Percentage

Co-Owners / Partners (names and %, if any)

Business Address

Business Bank (institution / account last 4)

Estimated Business Value (if known)

Location of Operating Agreement / Articles / Shareholder Agreement

Business Ownership / Equity (continued)

Succession and Key Contacts

Buy-Sell Agreement in Place? (Y/N / location)

Key Employee / Manager Who Runs Day-to-Day

Key Employee Phone / Email

Business Attorney

Attorney Phone / Email

Business Accountant / CPA

Accountant Phone / Email

Succession Notes

Your wishes or instructions for what should happen to the business — sell, transfer, wind down, or pass to a family member.

e.g. My intent is for the business to be sold if I am no longer able to run it. The buy-sell agreement with my partner James covers this. Contact our attorney at...

TIPS FOR THIS PAGE

- A buy-sell agreement governs what happens to your share if you die — locate it and note it here.
- If you have a partner, they likely have rights of first refusal on your share — your attorney can explain.
- Business assets and personal assets are separate — an estate attorney must be involved in any transfer.
- If the business is the primary income source for your family, succession planning is especially critical.

FOR LOVED ONES — YOUR NEXT STEPS

- Contact the business attorney immediately — business interests require professional handling.
- Do not make business decisions, sign contracts, or access business accounts without legal guidance.
- Identify the key employee or manager who can keep operations running during the transition.
- Ask the accountant about any outstanding tax filings, payroll obligations, or business debts.

Related sections: Freelance / Side Income (8B) · Legal and Estate · Taxes and Accountant (7F)

9

Legal and Estate

Will, trust, power of attorney, beneficiary designations, and attorney contact.

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9C	Trust	107
9D	Power of Attorney	109
9E	Beneficiary Designations	111
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Legal Snapshot

A quick overview of the estate planning documents you have in place and where to find them. This is the first page loved ones or an attorney should review to understand your legal situation.

A NOTE ON PROFESSIONAL ADVICE

- The documents listed here — wills, trusts, and powers of attorney — are legally significant. Recording their locations is a useful reference, but it does not replace working with a qualified estate attorney to ensure they are properly drafted, executed, and up to date.

Estate Planning Documents

Check off what exists and note where to find it — full details for each are recorded on the following pages.

Document	Location of Original	Exists?
Last Will and Testament See Will (9B)		☐ Exists?
Revocable Living Trust See Trust (9C)		☐ Exists?
Financial Power of Attorney See Power of Attorney (9D)		☐ Exists?
Beneficiary Designation Schedule See Beneficiary Designations (9E)		☐ Exists?
Trust Funding Schedule (asset list) See Trust (9C)		☐ Exists?
Letter of Instruction to Executor		☐ Exists?

Healthcare Legal Documents

Check off what exists and note where to find it — full details are recorded in Power of Attorney (9D) and Advance Directives / Healthcare POA (4D).

Document	Location of Original	Exists?
Healthcare Power of Attorney See Power of Attorney (9D)		☐ Exists?
Advance Directive / Living Will See Advance Directives (4D)		☐ Exists?
Do Not Resuscitate (DNR) Order See Advance Directives (4D)		☐ Exists?

Legal Snapshot (continued)

Key Legal Notes

Is estate designed to avoid probate? (Y/N / notes)	Executor of Will (name)	Trustee of Trust (name, if different)	Date Documents Last Reviewed	Estate Attorney (name / firm)	Attorney Phone / Email

TIPS FOR THIS PAGE

- Keep original signed documents in a fireproof safe or with your attorney; put copies in the Leo Pouch.
- Review and update these documents after any major life event: marriage, divorce, birth, death, or large asset change.
- A letter of instruction is not a legal document but can explain your wishes, account locations, and funeral preferences in plain language.

FOR LOVED ONES — YOUR NEXT STEPS

- Start here: confirm which documents exist, when they were signed, and where the originals are kept.
- Contact the estate attorney as soon as possible — they can guide the process from start to finish.
- Do not distribute any assets until the will has been reviewed by an attorney.
- If no will exists, the estate is distributed under your state's intestacy laws — an attorney is still essential.

Related sections: Will (9B) · Trust (9C) · Power of Attorney (9D) · Beneficiary Designations (9E) · Attorney Contact (9F) · Advance Directives / Healthcare POA (4D)

Additional Notes

Anything else about your estate planning documents that doesn't fit above.

Will

Record the key details of your Last Will and Testament and the people named in it. The original document governs — this page helps loved ones find it quickly and know who to contact.

Will Details

Date Signed

Location of Original (safe / attorney / bank)

Location of Copies

Attorney Who Drafted It

Attorney Phone / Email

Witness Names (if known)

Self-Proving / Notarized?

☐

Executor

Executor Name

Relationship

Phone

Email

Alternate / Successor Executor

Alternate Phone / Email

Guardianship (if applicable)

Named Guardian for Minor Children	Guardian Phone	Alternate Guardian	Alternate Guardian Phone

Will (continued)

Summary of Key Provisions (optional)

A plain-language summary of your wishes — not a legal substitute for the will itself.

e.g. Primary beneficiary is my spouse. Residual estate split equally between my three children. Personal property distributed per the letter of instruction...

TIPS FOR THIS PAGE

- Keep the original in a fireproof safe or with your attorney — a copy in the Leo Pouch is helpful but not a substitute.
- Tell your executor where the will is located — if they can't find it, probate may proceed as if none exists.
- A self-proving will has a notarized affidavit attached and is easier to admit to probate in most states.
- Review your will every 3–5 years and after any major life change.

FOR LOVED ONES — YOUR NEXT STEPS

- Locate the original will — do not rely on a photocopy for probate, as some states require the original.
- File the will with the probate court if required by your state — your attorney will guide this process.
- Contact the executor named in the will first — they are responsible for managing the estate.
- If you cannot find the will, contact the attorney who drafted it; they may retain a copy.

Related sections: Legal Snapshot (9A) · Trust (9C) · Power of Attorney (9D) · Attorney Contact (9F)

Trust

If you have established a trust, record its key details here. A properly funded trust can allow assets to pass to beneficiaries without going through probate. Leave blank if not applicable.

Trust Details		
Trust Name (as it appears on documents)	Type of Trust (revocable living / irrevocable / special needs / etc.)	Date Established
Location of Original Trust Document	Attorney Who Drafted It	Attorney Phone / Email

Trustees		
Current Trustee Name	Trustee Phone / Email	Successor Trustee 1
Successor 1 Phone / Email	Successor Trustee 2 (if any)	Successor 2 Phone / Email

Trust Funding		
Is the Trust Funded? (Y/N / partial)	Location of Funding Schedule / Asset List	Pour-Over Will in Place?
		☐

Assets Held in Trust
General description of what's held in the trust (e.g. primary residence, brokerage accounts, business interests).

Trust (continued)

Notes

Any important context about how the trust should operate, special beneficiary instructions, or conditions.

e.g. The trust holds the primary residence and brokerage accounts. My spouse is the primary beneficiary. Upon her death the remainder passes to our children equally...

TIPS FOR THIS PAGE

- A trust only controls assets that are titled in its name — 'funding' the trust is a separate step from creating it.
- A pour-over will captures any assets not in the trust at death and directs them into it through probate.
- Keep your trust document in a fireproof safe — unlike a will, it does not need to be filed with the court.
- Successor trustees step in when you can no longer serve — make sure they know they are named.

FOR LOVED ONES — YOUR NEXT STEPS

- A properly funded trust avoids probate for the assets it holds — contact the successor trustee immediately.
- Locate the trust document and the funding schedule to identify which assets the trust controls.
- The trustee has a legal duty to manage trust assets for the benefit of the beneficiaries.
- Work with the estate attorney to transfer any non-trust assets through the will or pour-over process.

Related sections: Legal Snapshot (9A) · Will (9B) · Beneficiary Designations (9E) · Attorney Contact (9F)

Power of Attorney

A Power of Attorney (POA) authorizes someone to act on your behalf while you are alive. Document your financial and healthcare agents here. Note: POA authority ends at death — your executor or trustee takes over at that point.

Financial Power of Attorney

Agent Name	Relationship	Phone
Email	Scope (general / limited / durable / springing)	Date Signed
Location of Original Document		

Alternate Financial Agent

Alternate Agent Name	Relationship	Phone	Email

Healthcare Power of Attorney

Also record this in Advance Directives (Section 4D) for quick medical access.

Healthcare Agent Name	Relationship	Phone
Email	Date Signed	Location of Original Document

Alternate Healthcare Agent

Alternate Agent Name	Relationship	Phone	Email

Power of Attorney (continued)

TIPS FOR THIS PAGE

- A durable POA remains in effect if you become incapacitated — this is usually the right choice.
- A springing POA only takes effect when a condition is met (e.g., you are declared incapacitated by a doctor).
- POA ends at death — after that, the executor or trustee has authority, not the POA agent.
- Make sure your agents know they are named and where to find the document.

FOR LOVED ONES — YOUR NEXT STEPS

- POA is only valid while the person is alive — if they have passed, contact the executor or trustee instead.
- If the person is incapacitated, the financial POA agent can manage finances; the healthcare agent manages medical decisions.
- Banks and institutions may require their own POA form in addition to the original document.
- If no POA is in place and the person is incapacitated, a court may need to appoint a guardian or conservator.

Related sections: [Legal Snapshot \(9A\)](#) · [Advance Directives / Healthcare POA \(4D\)](#) · [Attorney Contact \(9F\)](#)

Additional Notes

Anything else about your powers of attorney that doesn't fit above.

Beneficiary Designations

Beneficiary designations on accounts and policies override your will. This page helps you track who is named on each account and when you last verified it. Review these after every major life event.

Beneficiary Designations by Account

For retirement and investment account beneficiaries, see Retirement Accounts (8D) and Other Investments (8E) — use this table to confirm each one has been reviewed and dated.

Account / Policy	Institution / Company	Last Verified	Notes
401(k) / Employer Retirement Plan			
IRA / Roth IRA			
Life Insurance Policy 1			
Life Insurance Policy 2			
Annuity			
Brokerage (TOD Designation)			
Bank Account (POD Designation)			
HSA			

Beneficiary Designations (continued)

Account / Policy	Institution / Company	Last Verified	Notes

Notes

Any beneficiary designations with conditions, trusts as beneficiaries, or special circumstances.

e.g. IRA beneficiary is a conduit trust for the benefit of minor children. Life insurance split 60/40 between spouse and sibling. Verify 403b after job change in 2024...

TIPS FOR THIS PAGE

- Beneficiary designations override your will entirely — a will cannot redirect these assets.
- Name a contingent beneficiary on every account in case the primary beneficiary predeceases you.
- If you name a minor as beneficiary, a court-appointed guardian must manage the funds until they reach adulthood — a trust may be a better choice.
- Review all designations after marriage, divorce, the birth of a child, or the death of a named beneficiary.

FOR LOVED ONES — YOUR NEXT STEPS

- Contact each institution directly with a death certificate — beneficiary assets pass outside of probate.
- Do not assume the will controls these accounts — it does not.
- If a named beneficiary has already died and no contingent is listed, the account may go through the estate — consult an attorney.
- Roth and traditional IRA inherited rules differ significantly — get professional advice before withdrawing.

Related sections: Legal Snapshot (9A) · Will (9B) · Retirement Accounts (8D) · Other Investments (8E) · Insurance

Attorney Contact

Record the attorneys you work with so loved ones know exactly who to call. An estate or probate attorney is often the first professional contact needed after a death.

Estate / Probate Attorney

Attorney Name	Firm Name	Phone
Email	Office Address	Client File / Reference Number
Notes (documents held, ongoing work)		

Other Attorneys Family Law / Divorce

Attorney Name	Firm	Phone	Email
Notes			

Business / Corporate

Attorney Name	Firm	Phone	Email
Notes			

Real Estate

Attorney Name	Firm	Phone	Email
Notes			

Attorney Contact (continued)

Tax Attorney

Attorney Name

Firm

Phone

Email

Notes

Elder Law

Attorney Name

Firm

Phone

Email

Notes

Immigration

Attorney Name

Firm

Phone

Email

Notes

TIPS FOR THIS PAGE

- Your estate attorney may hold original documents (will, trust) on your behalf — confirm this and note it here.
- If you change attorneys, request that all original documents be transferred to you or your new attorney.
- Let your executor and spouse or partner know who your attorney is and how to reach them.
- Different attorneys handle different matters — a great estate attorney may not handle business law or real estate.

FOR LOVED ONES — YOUR NEXT STEPS

- Call the estate attorney as your first professional contact — they can guide every step of the process.
- Ask whether they hold any original documents and request a complete list of your files.
- If there is no estate attorney on file, contact your state bar's referral service or ask a trusted financial advisor.
- Business, real estate, and tax attorneys may also need to be contacted depending on the complexity of the estate.

Related sections: Legal Snapshot (9A) · Will (9B) · Trust (9C) · Business Ownership / Equity (8F)

10

Insurance

Life, health, disability, long-term care, property, auto, and umbrella coverage.

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10D Disability and Income Protection	121
10E Long-Term Care	123
10G Auto Insurance	125
10H Umbrella and Liability Insurance	127

This section is for reference and organization only — not legal, financial, or medical advice. Consult a qualified professional for your specific situation.



Insurance Summary

A one-page overview of every insurance policy you hold. Use this as a master index — loved ones can scan it to identify coverage and know where to look for details.

A NOTE ON PROFESSIONAL ADVICE

- Policy terms, coverage limits, and claim processes vary. For questions about what your policies cover or how to file a claim, contact your insurer or a licensed insurance professional.

All Policies at a Glance

Coverage Type	Company	Details In...
Life Insurance (primary)		Life Insurance (10B)
Life Insurance (secondary)		Life Insurance (10B)
Health Insurance		Health Insurance (4C)
Dental Insurance		Health Insurance (4C)
Vision Insurance		Health Insurance (4C)
Short-Term Disability		Disability (10D)
Long-Term Disability		Disability (10D)
Long-Term Care		Long-Term Care (10E)
Homeowner's / Renter's		Home Insurance (5E)
Auto (Vehicle 1)		Vehicle 1 (6A)
Auto (Vehicle 2)		Vehicle 2 (6B)
Auto (Vehicle 3)		Vehicle 3 (6C)
Umbrella / Excess Liability		Umbrella (10H)
Flood Insurance		Home Insurance (5E)
Valuable Items / Scheduled Personal Property		Home Insurance (5E)
Medicare		Medicare (11C)

Insurance Summary (continued)

Coverage Type	Company	Details In...
Medicaid		Medicaid (11D)

TIPS FOR THIS PAGE

- Fill in the summary here first, then complete the detailed worksheets for each policy type.
- The 'Details In...' column is pre-filled to guide you to the right worksheet for full policy information.
- Review this page annually — cancelled or lapsed policies should be removed to avoid confusion.
- Keep insurance card copies in the Leo Pouch for health, auto, and any policy needed in an emergency.

FOR LOVED ONES — YOUR NEXT STEPS

- Start here to identify all policies — then go to the referenced section for full details and claims contacts.
- File claims promptly — many policies have deadlines for filing after a loss or death.
- Life insurance proceeds are typically paid within 30-60 days of submitting a certified death certificate.
- Do not cancel any active policies until you have confirmed coverage is no longer needed.

Related sections: Life Insurance (10B) • Health Insurance (4C) • Disability (10D) • Long-Term Care (10E) • Home Insurance (5E) • Vehicles

Additional Notes

Anything else about your insurance coverage that doesn't fit above.

Life Insurance

Document every life insurance policy you hold — personal, employer-provided, and any policies on which you are the insured. The death benefit goes directly to the named beneficiary, not through your will.

Life Insurance Policies

Policy 1

Policy Type (term / whole / universal / group)	Insurance Company	Policy Number
Face Value / Death Benefit	Primary Beneficiary	Contingent Beneficiary
Agent Name	Claims Phone	Policy Location

Notes

Policy 2

Policy Type (term / whole / universal / group)	Insurance Company	Policy Number
Face Value / Death Benefit	Primary Beneficiary	Contingent Beneficiary
Agent Name	Claims Phone	Policy Location

Notes

Life Insurance (continued)

Policy 3

Policy Type (term / whole / universal / group)

Insurance Company

Policy Number

Face Value / Death Benefit

Primary Beneficiary

Contingent Beneficiary

Agent Name

Claims Phone

Policy Location

Notes

TIPS FOR THIS PAGE

- Name both a primary and contingent (backup) beneficiary — and keep them current after life changes.
- Group life insurance through work typically ends when employment ends; confirm portability options.
- The original policy document may be required to file a claim — note its location for each policy.
- Keep a copy of each policy's declarations page behind this page — it has the policy number, coverage amount, and beneficiary on one sheet.
- If you have a trust as beneficiary, confirm the trust is properly set up to receive the proceeds.

FOR LOVED ONES — YOUR NEXT STEPS

- Contact each insurance company directly with a certified death certificate to begin the claims process.
- Life insurance proceeds are paid to the named beneficiary and do not go through probate.
- For employer-provided group life insurance, contact HR first — they initiate the claim with the insurer.
- If you cannot locate a policy, search the National Association of Insurance Commissioners (NAIC) Life Policy Locator at naic.org.

Related sections: Insurance Summary (10A) • Employment Benefits (8C) • Beneficiary Designations (9E)

Additional Notes

Anything else about your life insurance that doesn't fit above.

Disability and Income Protection

Disability insurance replaces a portion of your income if you are unable to work due to illness or injury. Document your short-term and long-term disability policies here — these are critical if you become incapacitated but are still living.

Short-Term Disability

Source (employer / individual policy / state program)	Insurance Company (if individual)	Policy Number
Claims Phone	Benefit Amount (% of income or fixed amount)	Waiting / Elimination Period
Maximum Benefit Duration	How to File a Claim (contact / website)	

Long-Term Disability

Source (employer / individual policy)	Insurance Company (if individual)	Policy Number
Claims Phone	Benefit Amount (% of income or fixed amount)	Waiting / Elimination Period
Maximum Benefit Duration (to age 65, lifetime, etc.)	Definition of Disability (own-occupation / any-occupation)	How to File a Claim (contact / website)

Other Income Protection

State Disability Program (if applicable)	SSDI Eligibility Notes (see Government Benefits 11A)	Other Income Protection (mortgage disability, credit insurance)

Disability and Income Protection (continued)

TIPS FOR THIS PAGE

- Most employer short-term disability begins after a waiting period of 7-14 days of disability.
- Long-term disability typically begins after 90-180 days and covers a percentage of pre-disability income.
- Own-occupation policies pay if you cannot do your specific job; any-occupation policies pay only if you cannot do any job.
- Individual disability policies are portable if you leave your employer; group policies typically end with employment.
- Keep a copy of your policy summary or benefits statement behind this page — it has the policy number, benefit amount, and insurer's claims phone number.

FOR LOVED ONES — YOUR NEXT STEPS

- File disability claims as soon as possible — benefits are not retroactive beyond the waiting period.
- Contact HR for employer-sponsored disability; contact the insurer directly for individual policies.
- Social Security Disability Insurance (SSDI) may also apply — see Government Benefits (11A).
- Keep paying premiums on individual disability policies while a claim is pending — lapsing can void the claim.

Related sections: Insurance Summary (10A) • Employment Benefits (8C) • Government Benefits (11A)

Additional Notes

Anything else about your disability coverage that doesn't fit above.

Long-Term Care

Long-term care (LTC) insurance helps cover the cost of assisted living, nursing home care, or in-home care services when you can no longer perform daily activities independently. Leave blank if not applicable.

Long-Term Care Policy

Insurance Company	Policy Number	Agent Name
Agent / Customer Service Phone	Claims Phone	Daily / Monthly Benefit Amount
Maximum Benefit Period	Elimination / Waiting Period	Inflation Protection (Y/N / type)
Benefit Triggers (ADLs / cognitive impairment)	Annual Premium	Location of Policy Documents

Care Preferences (optional)

Your preferences for the type and location of care if LTC benefits are needed.

Preferred Type of Care (in-home / assisted living / memory care / etc.)	Preferred Location or Facility (if known)	Care Manager / Geriatric Care Advocate (if any)	Notes

TIPS FOR THIS PAGE

- LTC benefits are triggered by inability to perform 2 or more Activities of Daily Living (ADLs) or cognitive impairment.
- Keep the policy current — lapsed LTC policies are very expensive or impossible to reinstate.
- Some hybrid life/LTC policies have a death benefit if care is never needed; check your policy type.
- Note your care preferences here so family members can honor your wishes when the time comes.
- Keep a copy of your policy summary behind this page — it has the policy number, benefit amount, and insurer's claims phone number.

FOR LOVED ONES — YOUR NEXT STEPS

- Contact the insurer as soon as care begins — claims must be filed before benefits can be paid.
- The insurer may require an assessment of ADL limitations before approving benefits.
- Keep paying premiums while a claim is pending — some policies have a waiver of premium once claims begin.
- A care manager or social worker can help navigate the system and identify care options.

Related sections: Insurance Summary (10A) • Advance Directives / Healthcare POA (4D) • Personal Wishes (13B)



Auto Insurance

Full auto insurance details for each vehicle are recorded in the Vehicles section (6A–6D). Use this page as a consolidated quick reference for all auto policies and claims contacts.

Auto Insurance — All Vehicles

Full details including policy numbers and renewal dates are in Vehicles (6A–6D).

Vehicle 1

See Vehicle 1 (6A) for full policy details.

Insurance Company	Policy Number	Claims / 24-Hour Phone
Roadside Assistance	Renewal Date	Semi-Annual / Annual Premium
Notes		

Vehicle 2

See Vehicle 2 (6B) for full policy details.

Insurance Company	Policy Number	Claims / 24-Hour Phone
Roadside Assistance	Renewal Date	Semi-Annual / Annual Premium
Notes		

Auto Insurance (continued)

Vehicle 3

See Vehicle 3 (6C) for full policy details.

Insurance Company	Policy Number	Claims / 24-Hour Phone
Roadside Assistance	Renewal Date	Semi-Annual / Annual Premium

Notes

Other Vehicle 4

See Other Vehicles (6D) for full policy details.

Insurance Company	Policy Number	Claims / 24-Hour Phone
Roadside Assistance	Renewal Date	Semi-Annual / Annual Premium

Notes

TIPS FOR THIS PAGE

- Full details for each vehicle's insurance are in the Vehicles section (6A, 6B, 6C, 6D).
- Keep your insurance card in each vehicle's glove compartment and a copy in the Leo Pouch.
- If all vehicles are on the same policy, a single entry may cover all of them — note the vehicles in the Notes field.
- Review coverage levels annually — state minimums are often not enough to fully protect your assets.

FOR LOVED ONES — YOUR NEXT STEPS

- Call the claims line before moving or repairing any vehicle involved in an accident.
- Notify the insurer of the policyholder's death — coverage for other drivers on the policy may need updating.
- If a vehicle will not be driven, ask about a storage or parked-car rate to reduce ongoing premiums.
- Full policy details and renewal dates are in the Vehicles section for each vehicle.

Related sections: Insurance Summary (10A) • Vehicle 1 (6A) • Vehicle 2 (6B) • Vehicle 3 (6C) • Other Vehicles (6D) • Umbrella / Liability (10H)

Umbrella and Liability Insurance

An umbrella policy provides additional liability coverage beyond the limits of your home, auto, and other policies. Document your policy here. Leave blank if not applicable.

Umbrella / Excess Liability Policy

Insurance Company	Policy Number	Agent Name
Agent / Customer Service Phone	Claims Phone	Coverage Limit (e.g. \$1 million, \$2 million)
Annual Premium	Renewal Date	Underlying Coverage Requirements (home / auto minimums)
Location of Policy Documents		

Other Liability Policies

Professional liability, directors and officers, or other specialized liability coverage.

Policy Type	Company	Policy Number	Claims Phone	Coverage Limit	Notes
Professional Liability / E&O					
Directors and Officers (D&O)					

TIPS FOR THIS PAGE

- An umbrella policy requires minimum underlying coverage on home and auto — confirm those minimums are met.
- Umbrella coverage kicks in after underlying policy limits are exhausted.
- If you have significant assets, a rental property, a pool, a trampoline, or teenage drivers, an umbrella is worth considering.
- Coverage typically starts at \$1 million and is relatively inexpensive for the additional protection provided.
- Keep a copy of your policy declarations page behind this page — it has the policy number, coverage limit, and insurer's claims phone number.

Umbrella and Liability Insurance (continued)

FOR LOVED ONES — YOUR NEXT STEPS

- Contact the umbrella insurer if a liability claim arises that exceeds home or auto policy limits.
- Notify the umbrella insurer of the policyholder's death; coverage may need to be updated or cancelled.
- Check whether the estate itself has any ongoing liability exposure that requires continued coverage.
- Consult the estate attorney before cancelling any policies that may still be needed.

Related sections: Insurance Summary (10A) • Home Insurance (5E) • Auto Insurance (10G)

Additional Notes

Anything else about your liability coverage that doesn't fit above.

11

Government Benefits

Social Security, Medicare, Medicaid, and other government or military benefits.

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Government Benefits Snapshot

A summary of the government and military benefits you currently receive or may be entitled to. This helps loved ones notify the right agencies and identify survivor benefits that may be available to them.

A NOTE ON PROFESSIONAL ADVICE

- Social Security, Medicare, and Medicaid rules are complex and change over time. The information here is for your reference only. Contact the relevant agency or a benefits counselor for guidance on eligibility, enrollment, and claims.

Benefits at a Glance

Benefit / Program	Currently Receiving?	Monthly Amount	Agency / Phone	Details In...	Notes
Social Security Retirement	☐		ssa.gov / 1-800-772-1213	Social Security (11B)	
Social Security Disability (SSDI)	☐		ssa.gov / 1-800-772-1213	Social Security (11B)	
Supplemental Security Income (SSI)	☐		ssa.gov / 1-800-772-1213	Social Security (11B)	
Medicare Part A	☐		medicare.gov / 1-800-633-4227	Medicare (11C)	
Medicare Part B	☐		medicare.gov / 1-800-633-4227	Medicare (11C)	
Medicaid	☐		State Medicaid office	Medicaid (11D)	
VA Disability Compensation	☐		va.gov / 1-800-827-1000	Other Benefits (11E)	
VA Pension	☐		va.gov / 1-800-827-1000	Other Benefits (11E)	
Military Retirement Pay	☐		dfas.mil / 1-888-332-7411	Other Benefits (11E)	

Government Benefits Snapshot (continued)

Benefit / Program	Currently Receiving?	Monthly Amount	Agency / Phone	Details In...	Notes
Federal Employee Retirement (FERS / CSRS)	☐		opm.gov / 1-888-767-6738	Other Benefits (11E)	
	☐				

TIPS FOR THIS PAGE

- Government benefit payments must stop at death — overpayments must be returned to the agency.
- Social Security survivor benefits may be available to a spouse or dependent children — report the death to SSA.
- VA benefits may include a burial allowance and burial flag — contact the VA promptly.
- Full details for each benefit are in the individual worksheets for Social Security (11B), Medicare (11C), Medicaid (11D), and VA (11E).

FOR LOVED ONES — YOUR NEXT STEPS

- Notify Social Security within days of death — ongoing benefit payments that arrive after death must be returned.
- Ask SSA about survivor benefits for a spouse or dependent children — these can be significant.
- Contact the VA if the deceased was a veteran — burial benefits, survivor benefits, and VA pension may be available.
- Do not cash any government benefit checks that arrive after the date of death.

Related sections: Social Security (11B) · Medicare (11C) · Medicaid (11D) · Other Government or Military Benefits (11E)

Social Security

Record your Social Security details and benefit amounts. This information helps loved ones notify the SSA, stop payments, and claim any survivor benefits they may be entitled to.

Social Security Details

Social Security Number (last 4 digits only)	SSA Claim Number (if different from SSN)	Benefit Type (retirement / SSDI / SSI)
Current Monthly Benefit Amount	Payment Date (e.g. 2nd Wednesday of month)	Deposited To (bank / account last 4)
Full Retirement Age (if not yet receiving)	Estimated Benefit at Full Retirement Age (if not yet receiving)	

Potential Survivor Beneficiaries

List anyone who may be eligible for Social Security survivor benefits — a spouse and/or each dependent child.

Name	Relationship (spouse / child / etc.)	Notes (age, disability status, other eligibility details)

Survivor Benefit Info

SSA Lump-Sum Death Benefit (\$255 — paid to qualifying spouse or child)	SSA Phone / Website

Social Security (continued)

Additional Notes

Anything else about your Social Security benefits that doesn't fit above.

TIPS FOR THIS PAGE

- Your SSA My Account at ssa.gov shows your full earnings history and estimated future benefits.
- Survivor benefits can be up to 100% of the deceased's benefit amount for an eligible spouse.
- A spouse must generally be at least 60 years old (50 if disabled) to claim survivor benefits.
- Dependent children under 18 (or up to 19 if still in school) may also qualify for survivor benefits.
- Keep a copy of your latest Social Security benefit statement or COLA notice in the Leo Pouch — it confirms your current benefit amount at a glance.

FOR LOVED ONES — YOUR NEXT STEPS

- Call SSA at 1-800-772-1213 within a few days of death — monthly payments that arrive after death must be returned.
- Ask about the \$255 lump-sum death benefit and whether a surviving spouse or child qualifies.
- A surviving spouse may be able to claim Social Security survivor benefits as early as age 60.
- Visit ssa.gov or visit a local SSA office with a certified death certificate to start the process.

Related sections: [Government Benefits Snapshot \(11A\)](#) · [Medicare \(11C\)](#) · [Finances](#)

Medicare

Record your Medicare enrollment and supplemental coverage. Loved ones need this to notify Medicare, understand what medical bills are covered, and stop automatic premium payments. Leave blank if not yet enrolled.

A NOTE ON PROFESSIONAL ADVICE

- Medicare rules, plan options, and premiums change over time and vary by plan. This page is for recording your own coverage, not guidance on enrollment or plan choice — contact Medicare directly or a licensed benefits counselor (e.g. your State Health Insurance Assistance Program, SHIP) with questions.

Medicare Coverage

Medicare Beneficiary Identifier (MBI) — on red, white, and blue card	Part A — Hospital Insurance (enrolled Y/N, effective date)	Part B — Medical Insurance (enrolled Y/N, effective date)
Part B Monthly Premium	Part B Premium Deducted from SSA?	Part D — Prescription Drug Plan (plan name / insurer)
	☐	
Part D RxBIN / RxGRP (on prescription card)		

Medicare Supplement / Advantage

Plan Type (Medigap / Medicare Advantage / none)	Insurance Company	Plan Name / Letter (e.g. Plan G)
Policy / Member Number	Customer Service Phone	Monthly Premium
How Premium is Paid (auto-pay / check / deducted from SSA)		

Medicare (continued)

Additional Notes

Anything else about your Medicare coverage that doesn't fit above.

TIPS FOR THIS PAGE

- Keep your Medicare card in the Leo Pouch — the card number (MBI) is needed for medical appointments and billing.
- Part B premiums are often automatically deducted from Social Security payments — notify SSA to stop these after death.
- Medicare Advantage (Part C) plans replace original Medicare — contact the plan directly for claims or billing questions.
- Medigap (Supplement) premiums are paid separately to the insurer — cancel after death to stop auto-payments.
- Keep a copy of your latest Medicare premium notice or Explanation of Benefits (EOB) in the Leo Pouch — it confirms your current plan and amount at a glance.

FOR LOVED ONES — YOUR NEXT STEPS

- Notify Medicare at 1-800-633-4227 of the death — ongoing premiums need to stop.
- If Part B premiums were deducted from Social Security, SSA will stop them when notified of the death.
- Contact the Medicare Supplement or Advantage plan separately to cancel coverage and stop premium payments.
- Review any outstanding Medicare Explanation of Benefits (EOB) statements for unpaid bills or disputes.

Related sections: [Government Benefits Snapshot \(11A\)](#) · [Social Security \(11B\)](#) · [Health Insurance \(4C\)](#)

Medicaid (If Applicable)

Record Medicaid enrollment and case details here. Medicaid is state-administered and rules vary. Leave blank if not applicable. If Medicaid paid for long-term care, the state may seek reimbursement from the estate.

A NOTE ON PROFESSIONAL ADVICE

- Medicaid eligibility, coverage, and estate recovery rules are set by each state and change over time. This page is for recording your own enrollment details, not eligibility or legal guidance — contact your state Medicaid agency or an elder law attorney with questions.

Medicaid Enrollment

State of Enrollment	Medicaid ID / Case Number	Program Name (e.g. Managed Care plan name)
Benefits Covered (health / LTC / HCBS waiver / etc.)	Caseworker / Case Manager Name	Caseworker Phone
State Medicaid Agency Phone	State Medicaid Agency Website	

Long-Term Care and Estate Recovery

Did Medicaid pay for long-term care?	Notes (states may seek reimbursement from estate for LTC costs)	Elder Law Attorney (if working with one)	Attorney Phone / Email
☐			

Medicaid (If Applicable) (continued)

Additional Notes

Anything else about your Medicaid coverage that doesn't fit above.

TIPS FOR THIS PAGE

- Medicaid rules vary significantly by state — income and asset limits, covered services, and estate recovery rules all differ.
- If Medicaid paid for nursing home or long-term care, the state may file a claim against the estate to recover those costs.
- A surviving spouse, minor child, or disabled child may provide an exception to estate recovery.
- An elder law attorney is essential if Medicaid long-term care was involved in the estate.
- Keep a copy of your Medicaid eligibility notice or award letter behind this page — it has the case number the caseworker will ask for.

FOR LOVED ONES — YOUR NEXT STEPS

- Notify the state Medicaid office promptly — continued coverage terminates at death and ongoing payments must stop.
- If Medicaid paid for long-term care, ask the estate attorney about estate recovery claims before distributing any assets.
- Do not assume the home or other assets are safe from estate recovery without consulting an elder law attorney.
- Gather all Medicaid correspondence and billing statements for the estate attorney to review.

Related sections: [Government Benefits Snapshot \(11A\)](#) · [Medicare \(11C\)](#) · [Long-Term Care \(10E\)](#) · [Other Attorneys \(9F\)](#)

Other Government or Military Benefits

Record any military, veterans, federal, or other government benefits not covered in the previous worksheets. Veterans benefits in particular often include burial assistance, survivor benefits, and dependency allowances that many families are unaware of.

Military Service Record (Veterans)

Branch of Service	Service Dates (from / to)	Discharge Type (Honorable / General / etc.)
Location of DD-214 (Certificate of Release / Discharge)	VA File Number / Claim Number	VA Disability Rating (if any)

Benefits Received or Entitled To

Program / Benefit	Agency / Contact	Monthly Amount	File / Claim Number	Notes
VA Disability Compensation	va.gov / 1-800-827-1000			
VA Pension	va.gov / 1-800-827-1000			
VA Aid and Attendance	va.gov / 1-800-827-1000			
Military Retirement Pay	dfas.mil / 1-888-332-7411			
Survivor Benefit Plan (SBP)	dfas.mil / 1-888-332-7411			
Federal Employee Retirement (FERS/CSRS)	opm.gov / 1-888-767-6738			
State / Local Government Pension				
Workers Compensation				

Other Government or Military Benefits (continued)

Notes

Service organizations, VSO contacts, or other relevant information.

e.g. Enrolled with VFW Post 1234 for claims assistance. Filed claim for Aid and Attendance in 2023, still pending. DD-214 is in the safe with estate documents...

TIPS FOR THIS PAGE

- Keep your DD-214 in a safe place — it is the essential document for all VA benefits and burial honors.
- Veterans may be entitled to burial in a national cemetery, a burial flag, and a Presidential Memorial Certificate.
- The VA Aid and Attendance benefit can help cover assisted living and in-home care costs.
- Veterans Service Organizations (VSOs) like the VFW or American Legion offer free claims assistance.
- Keep a copy of your DD-214 (not the original) behind this page — it saves a trip to the safe when a VSO or VA office asks for it.

FOR LOVED ONES — YOUR NEXT STEPS

- Contact the VA at 1-800-827-1000 to report the death and ask about burial benefits, survivor benefits, and any pending claims.
- Locate the DD-214 — it is required to request military funeral honors and burial in a national cemetery.
- If the deceased was receiving military retirement pay, contact DFAS to stop payments and ask about SBP survivor benefits.
- A Veterans Service Organization (VSO) can help navigate VA benefits at no charge to the family.

Related sections: [Government Benefits Snapshot \(11A\)](#) · [Social Security \(11B\)](#) · [After-Death Arrangements \(13E\)](#)

12

Digital Life and Security

Account access, passwords, online presence, and digital security.

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12C	Subscriptions, Online Presence and Protection	147

Digital Life Overview

A map of your important online accounts, digital assets, and your wishes for how they should be handled. Do not record passwords here — use the Access and Security Notes worksheet (12B) to document how to access your password manager.

A NOTE ON SECURITY AND PRIVACY

- This section is for your own reference and organization only — not security, technical, or legal advice. We are not security experts; recording where your passwords live or adding access hints is simply one way to do this, not a recommendation you must follow. You are solely responsible for how you store, share, and safeguard your passwords, devices, and accounts.

Where Your Passwords Live

Where Are Your Passwords Stored? (password manager name, physical location, etc.)

Key Online Accounts

List important accounts so loved ones know they exist and what should happen to them. Subscriptions and recurring charges are on Subscriptions (12C). Access instructions are in 12B — do not enter passwords here.

Category	Service / Platform	Email / Username Used	Action After Death (close / memorialize / transfer / keep)	Notes
Email	Primary Email			
Email	Secondary Email			
Social Media	Facebook			
Social Media	Instagram			
Social Media	LinkedIn			
Social Media	X / Twitter			
Cloud Storage	Google Drive/Photos			
Cloud Storage	iCloud			

Digital Life Overview (continued)

Category	Service / Platform	Email / Username Used	Action After Death (close / memorialize / transfer / keep)	Notes
Shopping	Amazon			
Financial	PayPal / Venmo / Zelle			
Cryptocurrency	Exchange / Wallet			
Work	Work Email / Accounts			

Digital Wishes

Anything beyond a simple close / memorialize / transfer / keep decision — special instructions, content to preserve, or people to notify.

e.g. Please memorialize my Facebook page. Delete my Twitter/X account. My Google Photos library contains family photos — please download and share with family before closing the account. My blog at [URL] may be kept online or taken down...

TIPS FOR THIS PAGE

- No account in a listed category? Leave the row blank or write N/A.
- Facebook, Instagram, and Apple offer legacy contact or memorialization options — set these up in advance.
- Google's Inactive Account Manager lets you designate what happens to your Google data.
- Digital assets with monetary value (crypto, domains, digital businesses) should be mentioned in your will.
- Your email account is often the key to resetting every other account — note who should have access.

FOR LOVED ONES — YOUR NEXT STEPS

- Prioritize the primary email account — it is used to reset passwords and access most other accounts.
- Do not log into accounts using the deceased's credentials without legal authority.
- Contact platforms directly with a death certificate to request account closure or memorialization.
- Google, Apple, Facebook, and others have dedicated deceased-user support processes — search their help centers.

Related sections: Access and Security Notes (12B) · Subscriptions (12C) · Finances

Access and Security Notes

Guide loved ones to access your devices and accounts — without recording passwords directly in this kit. The best approach is a dedicated password manager. Use this page to tell them where that is and how to get into it.

A NOTE ON SECURITY AND PRIVACY

- This page is for your own reference only — not security or legal advice. We are not security experts; hints and access notes are simply one way to organize this information, not a recommendation. You are solely responsible for how you store, share, and safeguard your passwords, devices, and accounts.

Password Manager

Password Manager Tool (e.g. 1Password, Bitwarden, LastPass)	Master Password Hint (not the password itself — a hint only)	Emergency Kit / Recovery Code Location	Notes on Getting Access

Devices

Phone Make / Model	Phone PIN / Passcode Hint (not the code — a hint)	Computer Make / Model
Computer Login Hint	Tablet PIN / Passcode Hint (if applicable)	Where Devices Are Located

Critical Account Access

The handful of gateway accounts worth knowing by heart — they unlock everything else. Point to your password manager, not the password itself. For the full list of every account you have, see Digital Life Overview (12A).

Primary Email (service and username only)	Apple ID Email / iCloud	Google Account Email
Two-Factor Authentication (phone / authenticator app / backup codes location)	Backup / Recovery Codes Location	

Access and Security Notes (continued)

Access Instructions for Loved Ones

Step-by-step notes to help someone unfamiliar with your setup find what they need.

e.g. All passwords are in 1Password on my iPhone and iMac. The master password hint is [your hint]. The Emergency Kit PDF is in the red folder in my filing cabinet. Start by unlocking my iPhone using [hint]. Two-factor codes go to my phone number...

TIPS FOR THIS PAGE

- Never record actual passwords in this kit — use hints that only a trusted loved one would understand.
- A password manager with an emergency contact or emergency kit feature is the safest way to share access.
- Two-factor authentication codes usually go to a phone — make sure someone has access to your phone first.
- Store backup/recovery codes in a secure physical location (safe, Leo Pouch) separate from your devices.

FOR LOVED ONES — YOUR NEXT STEPS

- Start with the phone — it is often the key to two-factor authentication and everything else.
- Do not guess phone PINs more than a few times — most phones lock or erase after 10 failed attempts.
- If you cannot access accounts, contact Apple, Google, or the platform with a death certificate — they have legal processes.
- A digital estate attorney or tech-savvy advisor can help if access is blocked by two-factor authentication.

Related sections: Digital Life Overview (12A) · Subscriptions (12C)

Subscriptions, Online Presence and Protection

List digital subscriptions, online services, and any identity protection or monitoring accounts. Auto-renewing subscriptions continue charging after death until actively cancelled.

Digital Subscriptions and Services
What you're subscribed to and how to cancel it. For amounts and payment details, see Bills and Subscriptions (7C).

Service / App	Category	How to Cancel	Notes
Netflix	Streaming		
Spotify / Music	Streaming		
Amazon Prime	Shopping / Streaming		
Apple One / iCloud	Cloud / Services		
Google One	Cloud Storage		
Microsoft 365	Productivity		
Adobe Creative	Productivity		
News / Magazine	Media		
Gym / Fitness App	Health		
Domain / Website Hosting	Web		

Subscriptions, Online Presence and Protection (continued)

A NOTE ON SECURITY AND PRIVACY

- This page is for your own reference only — not security, legal, or identity-theft advice. We are not security experts; this is simply one way to track your subscriptions and protections, not a recommendation. You are solely responsible for how you manage and safeguard your accounts.

Identity Protection and Credit Monitoring

Identity / Credit Monitoring Service	Account / Member Number	Credit Freeze in Place? (Y/N — Equifax / Experian / TransUnion)

Credit Freeze PIN Location (not the PIN — where it is stored)

Notes

Additional Notes

Anything else about your digital subscriptions or online security that doesn't fit above.

TIPS FOR THIS PAGE

- Not subscribed to something listed? Leave the row blank or write N/A.
- Digital subscriptions charge automatically until cancelled — loved ones can cancel via the service's website or your bank.
- If you have a credit freeze, include the PIN location — loved ones may need to lift the freeze to handle estate matters.
- Domain registrations and website hosting renew automatically — if you have a website, note what should happen to it.
- Some subscriptions have family plans that others may want to keep under their own account.

FOR LOVED ONES — YOUR NEXT STEPS

- Review recent bank and credit card statements to find all active subscriptions — many are easy to miss.
- Cancel subscriptions directly with each service — disputing charges is harder and slower.
- Notify credit bureaus of the death to place a death notice, which helps prevent identity theft.
- Contact Equifax, Experian, and TransUnion to place a deceased alert on the credit file.

Related sections: Digital Life Overview (12A) · Access and Security Notes (12B) · Bills and Subscriptions (7C) · Bank Accounts (7A)

13

Personal Wishes and Guidance

Values, end-of-life care preferences, messages, legacy, and after-death arrangements.

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Personal Values and Intent

Share what matters most to you — your values, what you hope for your family, and how you want to be remembered. This is not a legal document. It is a gift of context for the people who love you.

What I Value Most

The beliefs, principles, or priorities that have guided your life.

e.g. Faith and family have always come first for me. I believe in hard work, honesty, and giving back to the community. I've tried to live by...

My Hopes for My Family

What you wish for the people you love — how you want them to live, what you hope they will carry forward.

e.g. I hope my children continue to stay close and support one another. I want them to know that their happiness matters more than any amount of money. I hope they...

Guidance and Wisdom

Lessons learned, advice you'd give, or things you want your loved ones to know.

e.g. Don't let grief become your identity. Take care of your health — I wish I had paid more attention to mine. Call your mother. Choose the people around you carefully...

Personal Values and Intent (continued)

How I'd Like to Be Remembered

The way you'd like people to think of you — informally or as a starting point for an obituary.

e.g. I'd like to be remembered as someone who made people feel welcomed and valued. I was at my best when I was cooking for people I loved, building things with my hands, and...

TIPS FOR THIS PAGE

- Write in your own voice — this is personal, not legal. There is no wrong way to do it.
- Even a few sentences in each section will mean the world to the people who read them.
- You can update and add to this section as often as you like.
- Consider sharing this section with a trusted person while you are alive — it can start meaningful conversations.
- Need more room? Feel free to continue on additional pages or a separate sheet tucked into your Leo Pouch.

FOR LOVED ONES — YOUR NEXT STEPS

- Read this section carefully — and perhaps more than once, at different times.
- These words are a gift. Honor them by letting them inform how you grieve, how you heal, and how you live.
- If an obituary or eulogy is needed, this section is a starting point.
- Share what resonates with others in the family who are grieving — these words belong to all of you.

Related sections: Messages to Loved Ones (13C) · Legacy, Memory and Meaning (13D) · After-Death Arrangements (13E)

Care Preferences at End of Life

Share your personal preferences for care if you are seriously ill or nearing the end of life. This is not a legal document — for legally binding instructions, complete an Advance Directive (Section 4D). Use this page to share your values and preferences in your own words.

Care Preferences

Where I Would Like to Be Cared For
(home / hospice / hospital / facility)

My Priority (comfort and quality of
life vs. all life-extending measures)

Pain Management Wishes

Who I Want Present (and who I do
not)

Spiritual or Religious Practices I Want
Honored

Music, Environment, or Comfort
Preferences

Legal Documents for End-of-Life Care

Note here — full details are in Advance Directives (4D) and Power of Attorney (9D).

Advance Directive in Place? (Y/N — see 4D)

Healthcare POA Agent (name — see 4D and 9D)

DNR or
POLST in
Place?

☐

In My Own Words

Anything not captured above — your values around illness, what a good death means to you, or what you need the people caring for you to know. Need more room? Continue on additional pages.

e.g. Please do not let me die alone. I want my favorite music playing. I would rather be comfortable than connected to machines. Please honor my faith traditions by...

Leo Kit · 13B Care Preferences at End of Life
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Care Preferences at End of Life (continued)

In My Own Words (continued)

Keep going if you need more room.

TIPS FOR THIS PAGE

- These preferences guide those caring for you — the more specific you are, the more confident they can be.
- Share this page with your healthcare agent, doctor, and close family members while you are able.
- Your advance directive and healthcare POA are the legal documents; this page captures your personal voice.
- Hospice care focuses on comfort and quality of life, not cure — it can begin before death is imminent.

FOR LOVED ONES — YOUR NEXT STEPS

- Honor these wishes as closely as circumstances allow — even partial honoring matters deeply.
- If the person is unable to speak for themselves, the healthcare agent named in Section 4D and 9D has legal authority.
- Ask the care team about palliative care or hospice if comfort-focused care is the preference.
- Do not feel guilty for honoring someone's wish to decline aggressive treatment — that is often the greatest act of love.

Related sections: Advance Directives / Healthcare POA (4D) · Power of Attorney (9D) · Long-Term Care (10E) · After-Death Arrangements (13E)

Messages to Loved Ones

Write personal messages to the people you love. These words are yours alone — a chance to say what you might not have said, to comfort, to thank, or simply to let people know they mattered.

To My Spouse / Partner

Write whatever is in your heart. There is no right length or right words. This page is just for you two.

To My Children

You may write a single message for all your children, or separate thoughts for each one. Whatever feels right.

To My Family

Parents, siblings, extended family — anyone you want to speak to directly.

To My Friends

Those who have walked alongside you. The ones who showed up.

Messages to Loved Ones (continued)

Other Messages

For anyone else you want to reach — a mentor, a colleague, a community.

Write to anyone you feel moved to reach.

TIPS FOR THIS PAGE

- The boxes here are a starting point, not a limit — if you want to write more, to more people, or attach separate letters, feel free to add pages.
- Write now, while you can — these words will outlast you and mean more than you know.
- It is okay to leave some sections blank. Write where you have something to say.
- You can return to this page and add to it at any time.
- If there are things you want to say privately to one person, consider a separate handwritten letter — and note here that it exists and where to find it.

FOR LOVED ONES — YOUR NEXT STEPS

- Read these slowly. You may not be ready to read them all at once, and that is okay.
- If a message was written for someone else in the family, please share it with them.
- These words are a gift. Keep them — print them, save them, return to them.
- If there is a reference to a separate letter or note, look for it where it is described.

Related sections: Personal Values and Intent (13A) · Legacy, Memory and Meaning (13D)

Legacy, Memory and Meaning

Capture the stories, objects, and memories you want preserved. This page helps your family understand the meaning behind things that might otherwise be lost — heirlooms, photos, places, and the chapters of your life.

Stories Worth Telling

Memories, experiences, or chapters of your life that you want your family to know and share.

e.g. The story of how I met your grandmother. What my childhood home was like. The year everything went wrong and how we got through it. The trip where everything changed...

Meaningful Possessions

Objects that carry a story or special meaning — and who you'd like to have them.

Item / Object	Why It Matters	Who I Would Like to Have It	Where It Is

Places That Mattered

Locations that were meaningful to you — where you grew up, where you were happiest, places worth revisiting.

e.g. The cabin on Lake Superior where we spent every summer. The church where we were married. The neighborhood I grew up in...

Legacy, Memory and Meaning (continued)

What I Hope My Legacy Is

How you want to be remembered not just as a person, but through what you built, gave, or changed.

e.g. I hope I made my family feel safe and loved. I hope the business I built continues to serve the community. I hope I showed my children that it is okay to start over...

TIPS FOR THIS PAGE

- Want to tell more stories, list more possessions, or add more content? Feel free to add pages — this is a starting point, not a limit.
- Write as much or as little as feels right — even a few sentences on a meaningful object can be treasured for generations.
- Photos, documents, and recordings can be referenced here even if they are stored elsewhere.
- If there are items of financial value you want to direct to specific people, also mention them in your will.
- Consider recording a video message — the sound of your voice may matter more than the words.

FOR LOVED ONES — YOUR NEXT STEPS

- Use this section to understand the meaning behind things — before you sell, donate, or discard anything.
- Share the stories with family members who may not know them.
- The meaningful possessions table is a guide, not a legal directive — for legally binding distributions, see the will.
- Honor the places, objects, and stories that mattered. That is the truest form of remembrance.

Related sections: Personal Values and Intent (13A) · Messages to Loved Ones (13C) · After-Death Arrangements (13E)

After-Death Arrangements and Preferences

Record your preferences for what happens after you die — burial or cremation, service wishes, and any pre-arranged plans. Making these wishes known removes an enormous burden from your loved ones at the hardest time.

Burial and Disposition Preferences

Preference (burial / cremation / body donation / green burial / other)	If Cremated — What Should Happen to Ashes	Preferred Burial Location (cemetery / family plot / other)
Pre-Arranged with a Funeral Home? ☐	Funeral Home Name	Funeral Home Phone
Pre-Need Contract Location / Number		

Service and Memorial Wishes

Type of Service (funeral / celebration of life / graveside / no service)	Preferred Location (church / funeral home / home / outdoors / etc.)	Preferred Officiant / Clergy (if any)
Music Preferences	Readings, Poems, or Passages	Flowers or Charitable Donation in Lieu?
Reception Preferences		
Notes for Obituary (key facts, preferred publications)		

Military Funeral Honors (Veterans)

Veterans are entitled to military funeral honors at no cost — the DD-214 is required to request them, so make sure loved ones know where to find it (see 11E).

Are You a Veteran?	Military Funeral Honors Desired?	Flag Presented To (name of recipient)	National Cemetery Preference (if applicable)
☐	☐		

After-Death Arrangements and Preferences (continued)

Additional Wishes

Anything else you want your family to know about how you'd like to be honored.

e.g. Please keep the service simple. I'd like people to share a meal together afterward. Donate to the local food bank in my name. I do not want an open casket. The pastor at First Church knows me well...

TIPS FOR THIS PAGE

- Pre-arranging with a funeral home removes difficult decisions from grieving family members.
- If you have a pre-paid plan, keep the contract with your Leo Pouch or estate documents.
- Veteran? Locate your DD-214 now and note in your Leo Pouch where it's kept — without it, loved ones cannot request military funeral honors.
- Note who should receive the American flag if you are a veteran — this must be decided at the time of services.
- Obituary guidelines: most papers need name, age, city, survivors, occupation, and service details.
- The obituary notes and additional wishes above are a starting point, not a full obituary or funeral program — if you'd like to write your own in full, or lay out a complete order of service, feel free to do that separately and note here where to find it.
- Want to be more specific about any of this? Feel free to add pages or a separate sheet tucked into your Leo Pouch.

FOR LOVED ONES — YOUR NEXT STEPS

- Look for pre-arranged contracts — they specify the funeral home and what is pre-paid.
- Veterans are entitled to military funeral honors including flag presentation and bugler or recording of Taps — contact the VA.
- Most decisions must be made within 24-72 hours of death — use this page to guide those choices.
- Honor the preferences here as closely as practical — it is one of the last gifts you can give.

Related sections: [Personal Values and Intent \(13A\)](#) · [Military / Government Benefits \(11E\)](#) · [Legal Snapshot \(9A\)](#)

14

How to Use This Kit

A guide for the people you leave behind — what to do, where to look, and how to move forward.

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When Someone Dies – How to Use This Kit

This section is written for the people who find this kit after a death. If that is you, we are sorry for your loss. This kit exists to help you find what you need without having to search alone. Start here.

BEFORE YOU READ THIS

- If you have not yet seen the break-glass sheet in the front of this kit — Start Here (First Steps After a Loss, worksheet 1D) — begin there. It covers the first hours: the immediate calls and the most urgent steps.
- This section picks up after that — organized by topic, not a strict timeline, since every loss unfolds differently. Work through it at your own pace, in whatever order makes sense for your situation.
- Keep a log as you work through this — write down every call you make: the date, the person you spoke with, and what was said. You will thank yourself later.
- For a fuller walkthrough with more detail, scripts, and support than fits on this page, visit www.walkwithleo.com.

NOTIFY THE RIGHT PEOPLE AND INSTITUTIONS

- Notify immediate family and close friends — you do not have to do this alone.
- Contact the employer or HR department — ask about final pay, life insurance, and COBRA health coverage (Sections 8A, 8C).
- Notify Social Security (1-800-772-1213) and ask about survivor benefits (Section 11B).
- Notify banks and other financial institutions (Section 7A).
- Notify Medicare and other government agencies that apply (Sections 11A–11E).

PLAN THE FUNERAL, MEMORIAL, AND OBITUARY

- Work with the funeral home on service details — burial, cremation, or memorial preferences may already be recorded (Section 13E).
- Draft or finalize the obituary — Section 13E has space for key facts and notes to get you started.
- This is often one of the harder tasks emotionally as well as logistically — www.walkwithleo.com has more detailed planning guidance and scripts if you want them.

LEGAL AND ESTATE MATTERS

- Locate the will if it has not already been found, and contact the estate attorney (Sections 9B, 9F) before distributing anything or making financial decisions.
- The estate attorney guides the probate or trust administration process — often the single most useful call you can make.
- Do not cancel accounts, sell property, or distribute assets until the attorney advises you.

FILE CLAIMS AND UPDATE ACCOUNTS

- File life insurance claims with each insurer (Section 10B).
- Notify retirement account custodians and begin the beneficiary claim process (Section 8D).
- Update or re-title property, vehicles, and investment accounts with the estate attorney's guidance.
- File a final federal and state tax return for the deceased — the estate may also need to file its own returns.

MANAGE BILLS, SUBSCRIPTIONS, AND DIGITAL ACCOUNTS

- Cancel or transfer utilities, subscriptions, and auto-pay services (Sections 5D, 7C, 12C).
- Notify the three credit bureaus (Equifax, Experian, TransUnion) to place a deceased alert and help prevent fraudulent accounts.
- Secure, close, or memorialize digital and online accounts (Section 12A).

When Someone Dies – How to Use This Kit (continued)

A Note From Me

If you would like to leave a personal message for the person reading this section, write it here.

e.g. If you are reading this, I hope you know how much you meant to me. I put this kit together so you would not have to figure everything out alone. Take your time. Ask for help. I believe you can do this...

TIPS FOR THIS PAGE

- You do not have to do everything at once. Focus on what needs to happen right away, then take the rest step by step.
- It is okay — and important — to ask for help. A trusted friend, a financial advisor, and an estate attorney can all share the load.
- Grief and logistics do not have to compete. You are allowed to stop and feel.
- This kit cannot cover every situation. When in doubt, ask the estate attorney, and visit www.walkwithleo.com for more guidance.

FOR LOVED ONES — YOUR NEXT STEPS

- You are already doing the right thing by reading this.
- Work through this kit at the pace that is right for you.
- Keep a log of every call you make and every institution you contact — dates, names, and what was said.
- You do not have to do this perfectly. You just have to do it.

Related sections: Immediate Actions and Contacts (Section 2) · Legal and Estate (Section 9) · Insurance (Section 10) · Government Benefits (Section 11)