

Instructions: Fill out this sheet per person. Keep it with your Will and / or with a trusted family member. Make sure it is kept in a secure location! Update this sheet when major life changes happen.

Name _____ **Date** _____

This Document Has Been Supplied To

Location of Will

Emergency Contacts

Children - Instructions

Pets – Instructions

Funeral Wishes

Organ Donor Notes

Name _____

Date _____

Financial Records of Note

Life Insurance Providers	Policy #	Amount	Expires
Bank Accounts	Account #	Username / Password	
Retirement Accounts	Account #	Username / Password	
Real Estate Address	Notes	Loan Balance / Value (optional)	
Digital Accounts (device, email, social)	Username	Password / PIN	

Name _____

Date _____

Additional Notes