
FROM “IN CASE ANYTHING HAPPENS”

Getting Your Affairs in Order

The checklist, on paper. The goal: one person you trust could find everything that matters — without guessing, digging, or hiring anyone.

If the list feels heavy, start here. These five cover the worst of it. About 30 minutes.

THE 30-MINUTE VERSION — DO THESE TODAY

- ☐ Write down your **phone passcode** and **email password**; seal them with your important papers
- ☐ Set your **Apple Legacy Contact** or **Google Inactive Account Manager** (3 minutes each)
- ☐ List every **bank and retirement account** — institution names only
- ☐ Write where your **will, deed, and insurance policies** physically are
- ☐ **Tell one person** where that piece of paper lives

DOOR 1 — DIGITAL ACCESS: PASSWORDS, PHONE, ONLINE ACCOUNTS

- ☐ **Phone passcode** — written down, stored with your important papers (not taped to the phone)
- ☐ **Password manager master password** — or your top 10 logins: email, banking, phone carrier, utilities
- ☐ **Primary email password** — password resets go there
- ☐ **Apple Legacy Contact** set
- ☐ **Google Inactive Account Manager** set
- ☐ **Two-factor backup codes** — printed
- ☐ **Subscriptions and auto-payments** — anything that charges a card every month
- ☐ **Social media accounts** — listed, with what you’d want done with them

Organizer’s list: what to gather and where to keep it. Not legal, financial, or medical advice. Full explanations and links: incaseanythinghappens.com/blog/getting-affairs-in-order-checklist

DOOR 2 – FINANCIAL ACCOUNTS AND IMPORTANT DOCUMENTS

- ☐ **Bank accounts** — institution and account type for each
- ☐ **Retirement accounts** — 401(k)s from every old employer, IRAs, pensions
- ☐ **Investment accounts** — brokerages, stock plans, crypto (with access notes)
- ☐ **Life insurance policies** — insurer, policy number, where the physical policy is
- ☐ **Other insurance** — health, home, auto, long-term care
- ☐ **Property** — deeds, titles, mortgage details, where the originals are
- ☐ **Debts** — mortgage, cards, loans
- ☐ **Will and/or trust** — its location, and your attorney's name if you have one
- ☐ **Power of attorney and advance directive / living will** — location, and who holds copies
- ☐ **Vital records** — birth and marriage certificates, Social Security cards, military discharge papers
- ☐ **Safe deposit box or home safe** — where it is, where the key is, who has access
- ☐ **Recent tax return** — where it is

DOOR 3 – YOUR WISHES

- ☐ **Care wishes** — what you'd want, and not want, if you couldn't speak for yourself
- ☐ **Funeral or memorial preferences** — burial or cremation, tone, anything pre-paid
- ☐ **The call list** — family, closest friends, attorney, financial advisor, employer's HR, Social Security
- ☐ **Pet care plan** — who takes them, vet info, any money set aside
- ☐ **Personal messages** — optional

THE LAST STEP – THE ONE THAT MAKES THE REST WORK

Where all of this is kept

The one person I told, and the date

Update it again on (once a year, or after a big life event)
