

# Roadmap for Heirs

In the event of your sudden death or incapacity, your heirs or caregivers need a roadmap of your personal affairs. Use the following list as a starting point. Keep it up-to-date in your personal financial files, and be sure your heirs have a current copy. This worksheet can be filled in and saved electronically, or printed for hand entry.

**Please note: this resource should NOT be a substitute for a will or other estate planning documentation. The intended purpose of this document is to provide a summary of significant items relating to your life.**

Recipient: \_\_\_\_\_

Date: \_\_\_\_\_

## Estate Planning Info

	Applicable Information
<b>Estate Planning Attorney</b>	_____
<b>Location of Documents</b> (including living will)	_____
<b>Post-mortem Preferences</b> (Include funeral preparations and location of supporting documents. Please note, organ donations are time sensitive)	_____
	_____
	_____

## Data for Death Certificate

	You	Your Spouse	Other Family
<b>Full legal name</b>	_____	_____	_____
<b>Social Security number</b>	_____	_____	_____
<b>Date of birth</b>	_____	_____	_____
<b>Date of death</b>	_____	_____	_____
<b>Birthplace</b>	_____	_____	_____
<b>Country of citizenship</b>	_____	_____	_____
<b>Mother's full name</b>	_____	_____	_____
<b>Mother's maiden name</b>	_____	_____	_____
<b>Father's full name</b>	_____	_____	_____
<b>Military veteran?</b>	_____	_____	_____
<b>Race/Ethnicity</b>	_____	_____	_____
<b>Occupation</b>	_____	_____	_____
<b>Highest Level of Education</b>	_____	_____	_____

# Roadmap for Heirs

## Your Personal Contacts

List those who you would like contacted in the event of a major incapacity or death.

	Name	Address (City, State, Zip) & Phone Number
<b>Your children</b>	_____	_____
<b>Your child's potential guardian</b>	_____	_____
<b>Clergy</b>	_____	_____
<b>Estate planning attorney</b>	_____	_____
<b>Estate Executor(s)</b>	_____	_____
<b>Trustee(s)</b>	_____	_____
<b>Portfolio Manager(s)</b>	_____	_____
<b>Accountant(s)</b>	_____	_____
<b>Employer(s)</b>	_____	_____
<b>Insurance agent(s)</b>	_____	_____
<b>Others</b>	_____	_____
(e.g., friends, colleagues, etc.)	_____	_____

## Your Home

Security	Location/Instructions	Contact Information
People who have a key to your home	_____	_____
Location of any hidden extra keys	_____	_____
Instructions for turning off the security system	_____	_____

Friends/Neighbors	Contact Information	Relationship
Friends & neighbors who know you and watch out for you	_____	_____
	_____	_____
	_____	_____
	_____	_____

Local Police	Phone Number
	_____

# Roadmap for Heirs

Emergency phone number	_____
Non-emergency phone number	_____

Financial Records	Location	Applicable Information
Location of financial and other personal records	_____	_____
Safe location and combination	_____	_____
Location of safe deposit box and key	_____	_____

Home Computer	Location	Applicable Information
Location of list of computer passwords	_____	_____
Email username and passwords	_____	_____

## Your Healthcare

	Name	Address (City, State, Zip) & Phone Number
Primary & specialist physicians	_____	_____
	_____	_____
	_____	_____
	_____	_____
Pharmacy	_____	_____
Preferred hospital	_____	_____
Preferred nursing home	_____	_____
Preferred retirement community	_____	_____
Other applicable information (such as custodial care prearrangements)	_____	_____

## What You Own

	Name of Institution/Person	Account Number/Location	Applicable Information
Bank Accounts (including CDs)	_____	_____	_____
	_____	_____	_____
	_____	_____	_____

# Roadmap for Heirs

**Accounts Receivables**

(Does anyone owe you money?)

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**Investment Accounts**

(taxable, retirement, and health savings accounts)


**Private Investments**


**Business Interests**


**Insurance Policies**


**Other Potential Death Benefits**

(e.g. Veteran's Admin.)

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	Property	Address (City, State, Zip)	Instructions
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**Real Estate**

(your residence and all other properties - including storage units)


	Item	Location	Instructions
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**Other physical assets**

(e.g., cash, precious metals, vehicles, etc.)

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# Roadmap for Heirs

**PINs**  
(e.g., Debit cards, cell phones, tablets, etc.)


**Digital assets**  
(e.g., Bitcoin, gift certificates, gambling websites, Venmo, etc.; include passwords)

Item	Location	Instructions

**Other important online accounts**  
(e.g., social media, etc.; include passwords)


**Special Personal Possessions**  
Collectibles & antiques with substantial monetary value, and items with emotional value

Item	Location	Instructions

## What You Owe

*Credit cards are listed in a different section. In this section, include information about each major debt, including:*

	Loan Number/Location	Name of Financial Institution	Address (City, State, Zip) & Phone Number
<b>Mortgages</b> Including home equity lines of credit			
<b>Car Loans</b>			

# Roadmap for Heirs

## School Loans

Location of Loan Note	Name of Person	Address (City, State, Zip) & Phone Number
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## Debts You Owe Other People


## Other

Description	Applicable Information

## Your Income

### Social Security Payments

Account Where Deposited

### Pensions

Name	Former Employer	Payment Schedule	Payment Location

### Rental Income

Property Address	Payment Schedule

### Trust Income

Account Number	Name of Financial Institution	Address (City, State, Zip) & Phone Number

### Alimony

Source of Payment	Address (City, State, Zip) & Phone Number

# Roadmap for Heirs



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	Account No./Payment Schedule	Name of Financial Institution	Address (City, State, Zip) & Phone Number
<b>Automatic Payments From Portfolio</b>	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
<b>Other Income</b>	_____	_____	_____
	_____	_____	_____
	_____	_____	_____

## Main Expenses

	Name of Institution	Card Number	Phone Number
<b>Credit Cards</b> (including department store cards)	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____

	Name	Schedule	Applicable Information	Phone Number
<b>Recurring Expenses</b>  (e.g., utilities, property taxes, estimated tax payments, house maintenance, cell phone, etc.)	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____

	Name	Address and/or Phone #	Amount/Schedule/Instructions
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# Roadmap for Heirs



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WEALTH MANAGEMENT

Sums you have been sending to various  
individuals/institutions
