

WORKBOOK FOR WHEN I'M GONE



FEATURES

- Personal Info
- Financial Plan
- Healthcare
- Online Data
- Grief Support

PLANNING FOR THE LIVING

Planning ahead for when you're no longer here can greatly ease the burden on your loved ones. Use this free, practical planner to organize and prepare every aspect of your life.



My Personal Information

Full Name: _____

Birthdate: _____

Place of Birth: _____

Social Security Number: _____

Home Address: _____

Phone Number(s): _____

Spouse Full Name: _____

Parents/Siblings Full Names (maiden names): _____

Pet(s) Names: _____

Primary Care Provider: _____

Education (school, college, university): _____

Charitable, Religious, Fraternal Organizations/Boards: _____

Advance Care Planning Documents

Advance Healthcare Directive: _____

Do Not Resuscitate: _____

Executor/Estate Planner: _____

Funeral Arrangements: _____

Health Care Proxy: _____

MOLST/POLST/POST: _____

Organ/Body Donation Paperwork: _____

Power of Attorney: _____

Important Contact Information

Name, phone number email and/or mailing address of:

Accountant: _____

Attorney: _____

Banker: _____

Clergy: _____

Employer: _____

Executor of Estate: _____

Financial Planner: _____

Funeral Home: _____

Health Care Proxy: _____

Important Contact Information

Name, phone number email and/or mailing address of:

Insurance Agent: _____

Pension/Retirement Fund Contact: _____

People Who Should be Notified: _____

Power of Attorney: _____

Stock Broker: _____

Tax Preparer: _____

Legal Documents

Death-Related Documents

Appointment of Agent to Control Disposition of Remains: _____

Certified Death Certificate (Vital Statistic): _____

Estate Plan: _____

Legal Will (Vital Statistic): _____

Living Trust: _____

Power of Attorney: _____

Transfer on Death: _____

Other Documents

Armed Forces ID/Discharge Papers: _____

Birth Certificate (Vital Statistic): _____

Deeds to Cemetery Plot: _____

Deeds to Property: _____

Deeds to Vehicle(s): _____

Divorce Certificate (Vital Statistic): _____

Driver's License or ID Card (Vital Statistic): _____

Other Documents

Health Insurance Cards: _____

Marriage License (Vital Statistic): _____

Naturalization/Immigration Records/Certificate of Citizenship: _____

Passport: _____

Personal Files: _____

Social Security Card (Vital Statistic): _____

Tax Returns: _____

Financial Information

Online account usernames and passwords, account numbers, asset values, contact information, security questions for the following:

Automatic Withdrawals/Payments: _____

Bank Account(s): _____

Cryptocurrency: _____

Donations (recurring and automated): _____

Investment Accounts: _____

Financial Information

Online account usernames and passwords, account numbers, asset values, contact information, security questions for the following:

Expenses or Money I Owe:

Garbage/Lawn care: _____

Mortgage/Rent: _____

Property Tax: _____

Utilities: _____

Financial Information

Online account usernames and passwords, account numbers, asset values, contact information, security questions for the following:

Insurance Policies:

Auto/Vehicle: _____

Health/Dental/Vision (including Medicare): _____

Homeowners's/Renter's: _____

Life: _____

Financial Information

Online account usernames and passwords, account numbers, asset values, contact information, security questions for the following:

- Loans in My Name:
 - Credit Cards: _____

 - Home Equity/Reverse Mortgage Loans: _____

 - Loans I Have Co-Signed For: _____

 - Other Loans (personal, private, other secured loans: _____

 - Property Loans: _____

 - Student Loans: _____

 - Vehicles: _____

Financial Information

Memberships (gyms, clubs, associations, etc.): _____

Money or Assets Owed to Me: _____

Personal Property: _____

Real Estate (property): _____

Retirement Accounts(s) (pension, 401K, etc.): _____

Stocks and Bonds: _____

Online Subscriptions (services or goods): _____

Print Subscriptions (newspapers or magazines): _____

Streaming Services (Amazon, Netflix, Hulu etc.): _____

Vehicle Subriptions: _____

Electronics and Online Accounts

Online Account Access:

Cloud Storage (iCloud, Dropbox, Flickr, etc.): _____

Delivery Services (food, medication, etc.): _____

Email Address(es): _____

Entertainment (streaming channels, music, gaming etc.): _____

Healthcare (Electronic Medical Record): _____

Shopping: _____

Software Licenses: _____

Travel: _____

Web Hosting: _____

Electronics and Online Accounts

Social Media:

Account Closing: _____

Health Updates: _____

Death Announcement Preferences: _____

Person to Act on My Behalf: _____

Usernames & Passwords for Each Platform (Facebook, Instagram, TikTok etc.):

Electronics and Online Accounts

Unlocking Electronics/Security:

Apple ID: _____

Cellphone: _____

Desktop Computer: _____

Laptop: _____

Tablet: _____

Home Security System: _____

Internet and Wi-Fi routers: _____

Funeral and Burial Plans

Burial/Cremation Plans: _____

Funeral Arrangements: _____

Heirlooms/Documents of Family History: _____

Obituary Information: _____

Personal Possessions I'd Like to Share (attach separately): _____

Bereavement Support

Quiet Oaks Programs:

Quiet Oaks Fellowship *For All*

This group is open to anyone who is grieving and looking to better understand their own journey. Meetings are held via Zoom on the **second Tuesday of each month at 7:00 p.m.** Each session features a different speaker and topic related to grief, creating a safe and welcoming space to learn, reflect, and grow.

Quiet Oaks Guy Talk

This group is just for men—a comfortable space to talk about grief or whatever is on your mind. Join us for lunch and time together on the **second Saturday of each month at 11:00 a.m.**, held in the Cottage at Quiet Oaks.

Quiet Oaks Gal Time

The heart of this group is a simple truth: you are not alone. Join us on the **third Thursday of each month at 2:00 p.m.** in the Cottage at Quiet Oaks. This supportive gathering offers a space to share and find meaning in your grief journey, and is facilitated by AnnElise Bergstrom, MA, Certified in Grief Support.

Additional grief resources can be found at:
QuietOaksHospiceHouse.org/grief-healing/