

Could Your Family Find It?

Legacy Organization Checklist

If someone you trust needed to step in tomorrow, would they know what you have and where to find the information? This is a quick organization check - not an estate plan.

1. MY PEOPLE

Spouse / partner & dependents	☐ Yes	☐ No	☐ Organize
Emergency contact	☐ Yes	☐ No	☐ Organize
Trusted person who could help	☐ Yes	☐ No	☐ Organize

2. MY MONEY & PROPERTY

Bank accounts	☐ Yes	☐ No	☐ Organize
Retirement / investments	☐ Yes	☐ No	☐ Organize
Home, vehicles, business interests	☐ Yes	☐ No	☐ Organize
Major debts / loans	☐ Yes	☐ No	☐ Organize

3. MY PROTECTION & DOCUMENTS

Life & health insurance information	☐ Yes	☐ No	☐ Organize
Will / trust, if applicable	☐ Yes	☐ No	☐ Organize
Beneficiary information	☐ Yes	☐ No	☐ Organize
Other important directives / documents	☐ Yes	☐ No	☐ Organize

4. CAN SOMEONE FIND IT?

Where are your important records kept? **Do not write passwords or PINs here.**

Does at least one trusted person know where this information is stored? ☐ Yes ☐ No ☐ I need to handle this

MY NEXT STEP

The ONE thing I need to organize, update, or find first is:

I want to take this step by: _____

That's it. Start by knowing what you have, what's missing, and where the important information lives.

Educational use only. This checklist is not legal, tax, insurance, or individualized investment advice.

Now, What Needs Your Attention?

Look back at anything you marked **No** or **Organize**. You do not need to fix everything today. Use this page to decide what needs attention and what your next move will be.

WHAT DO I NEED TO HANDLE?

What needs attention?	What do I need to do?	Who can help?	By when?

QUESTIONS I STILL HAVE

What did you realize you do not know yet?

RESOURCES I MAY NEED

☐ Insurance information / help	☐ Will or trust information
☐ Beneficiary review	☐ Financial organization
☐ Budgeting / savings help	☐ Other: _____

MY FIRST MOVE

Of everything I wrote down, the first thing I'm going to handle is:

I will do it by: _____

One step at a time.

You identified where you are. Now you can see what's missing, decide what resources may help, and create your next step.