

Disability & Death Book

Name: _____

Date Created: _____

Last Updated: _____

Primary Contact: _____

1. Start Here

- Location of this book and original documents
- Date last updated
- Top three people to call first (in order)
- Immediate priorities (home, pets, mail, utilities)
- Location of password manager access instructions
- Location of key inventory

2. Key Contacts

- Executor / personal representative
- Attorney (firm + phone)
- Financial advisor
- Accountant / tax preparer
- Insurance agent(s)
- Primary care physician
- Specialists
- Pharmacy
- Close family/friends to notify
- Business/board contacts

3. Identification & Vital Records

- Driver's license / state ID
- Passport
- Social Security information (location)
- Birth certificate
- Marriage/divorce documents
- Military records (if applicable)
- Citizenship/immigration documents (if applicable)

4. Legal Documents & Authority

- Will (location of original)
- Trust documents and amendments
- Power of attorney (financial)
- Medical power of attorney / healthcare proxy
- Living will / advance directive
- HIPAA authorization
- Deeds and property titles
- Prenup/postnup (if applicable)

5. Financial Accounts

- Checking accounts
- Savings accounts
- Money market / CDs
- Brokerage accounts
- Retirement accounts (IRA, 401k, etc.)
- Safe deposit box location and access
- Where income is deposited
- Where bills are auto-paid

6. Income Streams

- Social Security details
- Pension(s)
- Annuities
- Rental income
- Royalties/residuals
- Dividends/distributions
- Employment income (if applicable)

7. Debts & Liabilities

- Mortgage or HELOC
- Auto loans
- Credit cards
- Personal loans
- Student loans (if applicable)
- Lines of credit
- Notes payable (family/private loans)

8. Insurance & Benefits

- Health insurance / Medicare + supplement
- Life insurance policies
- Long-term care insurance
- Disability insurance
- Homeowners insurance
- Auto insurance
- Umbrella policy
- Veterans benefits (if applicable)

9. Primary Residence & Operations

- Mortgage/lease details
- HOA information
- Utilities providers and account info
- Alarm/security system
- Smart home access
- Home maintenance contacts
- Home inventory (photos/appraisals)
- Location of safes or lockboxes

10. Vehicles & Transportation

- Car titles and registrations
- Loan/lease information
- Insurance cards
- Spare key locations
- Boat/RV/trailer titles (if applicable)

11. Business & Organizational Roles

- Business ownership documents
- Partnership/shareholder agreements
- Current contracts
- Board roles and successors
- Client or vendor contacts
- Location of business records

12. Taxes

- Last 2–3 years of tax returns
- CPA contact information
- Property tax records
- Location of supporting documents

13. Digital Life

- Password manager instructions
- Phone unlock instructions (stored securely)
- Apple ID / Google account recovery info
- Email accounts
- Cloud storage accounts
- Social media accounts (memorialize/delete)
- Online banking access notes
- Subscriptions and memberships
- Domain names / website hosting (if applicable)

14. Keys & Physical Access

- Master key inventory
- Home keys
- Vehicle keys
- Mailbox keys
- Storage unit keys
- Who holds spare keys
- Garage codes / keypad codes (stored securely)

15. Pets

- Pet names and microchip numbers
- Veterinarian contact information
- Medications and feeding instructions
- Primary caregiver
- Backup caregiver
- Written treatment authorization
- Copy of vaccination and medical records
- Emergency boarding facility
- Pet trust or will provision location (if applicable)
- Funds allocated for ongoing care
- Location of supplies

16. Final Wishes & Personal Notes

- Burial or cremation preference
- Prepaid arrangements
- Funeral home contact
- Donation preferences
- Location of personal letters
- Distribution notes for personal property

