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END-OF-LIFE GUIDEBOOK

EVERYONE NEEDS AN END-OF-LIFE PLANNER

An end-of-life planner is more than a document — it's a guide that captures your final wishes, important information, and personal messages so your family doesn't have to make difficult decisions in the middle of grief.

This guidebook is designed to guide your loved ones through the practical steps they need to take after your passing. It includes instructions, checklists, and space for personal notes. Keep it in a safe place and let trusted people know where to find it.

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IMMEDIATE STEPS

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Notify family, close friends and employers as soon as possible after death.

Contact List:

Name	Phone Number	Email Address

Employer	Name of Contact	Phone Number

Employer Considerations:

- Final Pay
- Employer Sponsored Life Insurance
- Benefit Designations
- Required Paperwork

IMMEDIATE STEPS (continued)

Arrange care for dependents and pets.

Dependent Care Notes:

Pet Care Notes:

FUNERAL & MEMORIAL ARRANGEMENTS

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This section contains my personal preferences for final arrangements.

Preferred Arrangement (burial, cremation, other)

I prefer to be:

Funeral Home Contact Information:

Funeral Home Address Phone Number

Prepaid Service Details & Receipts:

Religious or Cultural Preferences:

Obituary Notes – Where to Publish & What to Include:

LEGAL & FINANCIAL DOCUMENTS

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Locate and review these documents with the executor of the estate and/or an attorney.

Last Will & Testament or Trust:

Where are these documents located?

_____

_____

_____

Executor of Estate:

Named Executor	Phone Number	Relationship to Deceased
_____	_____	_____

Attorney Information:

Name of Attorney	Phone Number	Address
_____	_____	_____

Life Insurance Policies:

Where are the policy documents located?

_____

_____

Policy Number	Carrier Information	Beneficiary
_____	_____	_____
_____	_____	_____
_____	_____	_____

Bank Accounts:

Name of Bank	Account Number	Cosigner(s)
_____	_____	_____
_____	_____	_____
_____	_____	_____

Retirement Accounts (401K, IRA, Pensions, etc.)

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Type of Account	Account Number	Account/Policy Location

Debts & Outstanding Expenses: (Mortgages, Loans, Credit Cards, etc.)

Type of Debt or Expense	Company, Bank or Carrier	Account/Policy Location

Property Deeds & Vehicle Titles:

Address of Property	Location of Deed	Approximate Value

VIN Number of Vehicle	Location of Title	Make & Model

DIGITAL INFORMATION

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Includes information and access to online accounts and digital assets.

Site Locations & Passwords:

Site Name or URL	Type of Account	Username/Password

Social Media:

Below are my wishes for my social media accounts.

NOTE: Common options include deleting, memorializing or transferring accounts.

Email Accounts & Instructions:

Email Address	Type of Account	Username/Password

Subscriptions & Memberships:

Subscription	Website or Contact Information	Cancellation or Transfer Instructions

PERSONAL WISHES

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List your personal notes for distribution of possessions and personal messages to loved ones.

Personal Items Distributions: (not mentioned in the Last Will & Testament)

Description of Item	Location of Item	Person to Receive Item

Charitable Donations

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Name of Charity	Amount or Donation Request	Contact for Charity

Notes for Loved Ones:

Dear _____

Dear _____

Dear _____

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Dear _____

Dear _____

KEY CONTACTS

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Here is a list of key contacts for handling important affairs.

Notes for Loved Ones:

Executor/Trustee Contact Information

Name Phone Number Responsibility

_____ _____ _____

_____ _____ _____

Attorney

Name **Phone Number** **Email Address**

_____ _____ _____

_____ _____ _____

Insurance Agent

Name Phone Number **Email Address**

_____ _____ _____

_____ _____ _____

Other Important Contacts (clergy, business partners, friends, acquaintances)

Name **Phone Number** **Email Address**

_____ _____ _____

_____ _____ _____

_____ _____ _____

_____ _____ _____

_____ _____ _____

_____ _____ _____