EXAMPLE

IMPORTANT INFORMATION FOR MY FAMILY

Ruth Alvarez

Updated November 12, 2026

If something has happened to me

1. Call the people listed in **Section 2, Key contacts**.
2. My will and legal papers are listed in **Section 4**.
3. Anything marked 🔒 was left to be written by hand, on purpose.

This binder is kept

Backup file passphrase

This binder helps your family find things. It is not a will or a legal document.

EXAMPLE

Start here

Read this first. It says who to call, where the important papers are and what can't wait. Everything else is behind the numbered tabs.

1 Call these people first

Name, relationship, phone	Daniel Alvarez (son), 555-0101
	Sofia Alvarez (daughter), 555-0102

2 Where the important papers are

Will (the original)	With attorney Dana Whitfield
Trust	None
Financial power of attorney	With attorney Dana Whitfield
Health care power of attorney	With attorney Dana Whitfield
Advance directive	With attorney Dana Whitfield
Life insurance policies	Fireproof box, hall closet
Birth certificate	Fireproof box, hall closet
Social Security card	Fireproof box, hall closet

3 What can't wait

Pets	Biscuit (cat). Sofia Alvarez will care for them
People who depend on me	None
Automatic payments to stop	Prairie Card; Phone, Cascade Wireless
Spare keys	Kitchen drawer by the back door

4 This binder

Copies of this binder are with	
The backup file is kept	

Passwords, PINs and codes are written by hand in the sections, next to a lock.

EXAMPLE

Contents

1 **About me**
Name, birth, ID, marriage, service

2 **Key contacts**
Who to call first, and who knows what

3 **Medical**
Medications, conditions, directives, coverage

4 **Legal documents**
Will, trust, powers of attorney

5 **Money**
Bank accounts, investments, debts

6 **Insurance**
Life, home, car, long-term care

7 **Home & property**
House, vehicles, keys, valuables

8 **Bills & subscriptions**
What gets paid, how, and when

9 **Digital life**
Phone, email, passwords, accounts

10 **Pets**
Who they are and who will care for them

11 **People who depend on me**
Anyone who relies on you

12 **Work & business**
Employer, pension, business

13 **Funeral & final wishes**
Arrangements and wishes

14 **Letters & messages**
Letters and messages for the people you love

This binder helps your family find things. It is not a will or a legal document.

EXAMPLE

1

SECTION 1

About me

Name, birth, ID, marriage, service

IN THIS SECTION

1.1 Full legal name

1.2 Birth

1.3 Social Security

1.4 Driver’s license or ID

1.5 Marriage

1.6 Military service

EXAMPLE

1 About me

Section 1
Name, birth, ID, marriage, service

Full legal name

Full legal name	Ruth Maria Alvarez
Other names you have used	Ruth Moreno (maiden name)

Birth

Date of birth	March 3, 1951
Place of birth	Tucson, Arizona
Where the birth certificate is	Fireproof box, hall closet

Social Security

Social Security number	*Write here by hand*
Where the card is	Fireproof box, hall closet

Driver's license or ID

Where it is	Desk drawer, study
When it expires	2029

Marriage No

Military service No

Notes

EXAMPLE

2

SECTION 2

Key contacts

Who to call first, and who knows what

IN THIS SECTION

2.1 Call first

2.2 Doctor

2.3 Attorney

2.4 Advisor or accountant

2.5 Neighbor with a key

EXAMPLE

2 Key contacts

Section 2
Who to call first, and who knows what

Call first

People to call first	Daniel Alvarez (son), 555-0101; Sofia Alvarez (daughter), 555-0102

Doctor

Name and practice	Dr. Anita Shah, Riverside Family Medicine
Phone	555-0142

Attorney

Name and firm	Dana Whitfield, Whitfield & Cole
Phone	555-0110

Advisor or accountant

Name and company	Marcus Lee, Harborview Investments
Phone	555-0188

Neighbor with a key

Name and address	Pat Okafor, next door at 412
Phone	555-0176

Notes

EXAMPLE

SECTION 3

Medical

Medications, conditions, directives, coverage

3

IN THIS SECTION

3.1 Medications

3.2 Allergies

3.3 Conditions

3.4 Advance directive

3.5 Organ donation

3.6 Health coverage

EXAMPLE

3 Medical

Section 3
Medications, conditions, directives, coverage

Medications

Medication	Dose	When
Lisinopril	10 mg	Each morning
Atorvastatin	20 mg	Each evening

Pharmacy	Elm Street Pharmacy, 555-0133

Allergies

Allergies	Penicillin

Conditions

Conditions	High blood pressure; mild hearing loss in left ear

Advance directive

Where it is	With attorney Dana Whitfield
Who has a copy	Daniel Alvarez (son), 555-0101

Organ donation

Anything to add	Marked on my driver's license

Health coverage

Plan name	Medicare Parts A and B, with a Medigap Plan G
Member ID	*Write here by hand*
Where the card is	Desk drawer, study

Notes

EXAMPLE

SECTION 4

Legal documents

Will, trust, powers of attorney

4

IN THIS SECTION

4.1 Will

4.2 Trust

4.3 Financial power of attorney

4.4 Health care power of attorney

4.5 Guardianship nomination

4.6 Prenup or postnup

EXAMPLE

4 Legal documents

Will

Where is the original?	With attorney Dana Whitfield
When was it signed?	2023
Who has a copy?	Daniel Alvarez (son), 555-0101

Trust No

Financial power of attorney

Who you named	Sofia Alvarez (daughter), 555-0102
Where the papers are	With attorney Dana Whitfield

Health care power of attorney

Who you named	Daniel Alvarez (son), 555-0101
Where the papers are	With attorney Dana Whitfield

Guardianship nomination Not applicable

Prenup or postnup Not applicable

Notes

EXAMPLE

SECTION 5

Money

Bank accounts, investments, debts

IN THIS SECTION

5.1 Bank accounts

5.2 Retirement and investments

5.3 Credit cards

5.4 Loans and mortgage

5.5 Safe deposit box

5.6 Taxes

5

EXAMPLE

5 Money

Section 5
Bank accounts, investments, debts

Bank accounts

Bank	Type	Ending	Owner	Where the papers are
Lakeside FCU	Checking	••4417	Joint with Sofia	Fireproof box, hall closet
Lakeside FCU	Savings	••4425	Ruth only	Fireproof box, hall closet

Online banking password — *Write here by hand*

Retirement and investments

Company	Type	Ending	Beneficiary named?	How to get in
Harborview Investments	IRA	••9031	Yes: Daniel, Sofia	Call Marcus Lee, 555-0188

Credit cards

Card	Type	Ending	Paid how	What to do
Prairie Card	Visa	••5520	Autopay from ••4417	Pay off, then close

Loans and mortgage No

Safe deposit box

Which bank and box — Safe deposit box #214, Lakeside FCU

Where the key is — *Write here by hand*

Taxes

Where past returns are — Fireproof box, hall closet

Tax preparer

EXAMPLE

SECTION 6

Insurance

Life, home, car, long-term care

IN THIS SECTION

6.1 Life insurance

6.2 Home or renters insurance

6.3 Car insurance

6.4 Long-term care

EXAMPLE

6 Insurance

Life insurance

Company	Policy ending	Beneficiaries	Agent and phone	Where the policy is
Northwind Mutual	••7702	Daniel and Sofia, equally	Gloria Park, 555-0161	Fireproof box, hall closet

Home or renters insurance

Company	Policy ending	Agent and phone	Where the policy is
Granite State Home	••3318	Gloria Park, 555-0161	Desk drawer, study

Car insurance

Company	Policy ending	Agent and phone	Where the policy is
Granite State Auto	••3320	Gloria Park, 555-0161	Glove box of the car

Long-term care

Circle one Yes No

Company	Policy ending	Agent and phone	Where the policy is

EXAMPLE

SECTION 7

Home & property

House, vehicles, keys, valuables

IN THIS SECTION

7.1 Your home

7.2 Vehicles

7.3 Keys and codes

7.4 Valuables

7.5 Shutoffs

EXAMPLE

7 Home & property

Section 7
House, vehicles, keys, valuables

Your home

Where the deed is	Fireproof box, hall closet
How property tax is paid	By check each November and April

Vehicles

Vehicle	Where the title is	Loan
2017 Honda CR-V, silver	Fireproof box, hall closet	None

Keys and codes

Spare keys	Kitchen drawer by the back door
Alarm code	*Write here by hand*

Valuables

What it is and where	Grandmother's gold bracelet and the pearl earrings, in the jewelry box in the bedroom closet. The quilts in the cedar chest.

Shutoffs

Where they are	Water: basement, by the furnace. Gas: outside, on the left side of the house.

Notes

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SECTION 8

Bills & subscriptions

What gets paid, how, and when

IN THIS SECTION

8.1 Automatic payments

8.2 Bills paid by hand

8.3 Subscriptions

8.4 Mail

EXAMPLE

8 Bills & subscriptions

Automatic payments

Bill	Paid from	Keep, cancel or transfer
Prairie Card	Checking ••4417	Cancel
Electric, Valley Power	Checking ••4417	Transfer
Phone, Cascade Wireless	Prairie Card ••5520	Cancel

Bills paid by hand

Bill and when it's due	
Property tax, by check in November and April. Church pledge, monthly.	

Subscriptions

What it is	How to cancel
Daily Ledger newspaper	Call 555-0190
Brightview streaming	Online, under Account settings

Mail

Address or PO box	
408 Linden Avenue, Riverside	

Notes

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SECTION 9

Digital life

Phone, email, passwords, accounts

IN THIS SECTION

9.1 Phone

9.2 Email

9.3 Password manager

9.4 Social media

9.5 Legacy contact

EXAMPLE

9 Digital life

Section 9
Phone, email, passwords, accounts

Phone

Phone passcode	*Write here by hand*
Carrier	Cascade Wireless

Email

Email address	ruth.alvarez@example.com
Password	*Write here by hand*

Password manager No

Social media

Accounts and what to do with them	Facebook: memorialize it. Instagram: close it.

Legacy contact

Circle one	Yes No
Who you chose	

Notes

EXAMPLE

SECTION 10

Pets

Who they are and who will care for them

10

IN THIS SECTION

10.1 Your pets

10.2 Caretaker

10.3 Care notes

EXAMPLE

10 Pets

Section 10
Who they are and who will care for them

Your pets

Name	Kind	Age	Vet and phone
Biscuit	Cat	9	Riverside Animal Clinic, 555-0128

Caretaker

Who	Sofia Alvarez (daughter), 555-0102

Care notes

Care notes	Dry food twice a day, half a cup. Thyroid pill hidden in a treat each morning.

Notes

EXAMPLE

SECTION 11

People who depend on me

Anyone who relies on you

11

IN THIS SECTION

11.1 Dependents

11.2 Backup caregiver

11.3 Regular commitments

EXAMPLE

11 People who depend on me

Section 11
Anyone who relies on you

Dependents No

Backup caregiver Not applicable

Regular commitments Not applicable

Notes

EXAMPLE

SECTION 12

Work & business

Employer, pension, business

IN THIS SECTION

12.1 Employer

12.2 Pension

12.3 Business

12

EXAMPLE

12 Work & business

Employer No

Pension

Paid by	Riverside School District teachers' pension
Where the papers are	Fireproof box, hall closet

Business No

Notes

EXAMPLE

SECTION 13

Funeral & final wishes

Arrangements and wishes

IN THIS SECTION

13.1 Arrangements

13.2 Burial or cremation

13.3 Service

13.4 Obituary

EXAMPLE

13 Funeral & final wishes

Arrangements

Funeral home	Hillcrest Funeral Home
Where the contract is	Fireproof box, hall closet

Burial or cremation

Your wishes	Cremation. Scatter the ashes at Lake Sabino, where we went every summer.

Service

Your wishes	A small service at St. Mark's. "Ave Maria" and Psalm 23. Lunch afterwards, nothing fancy.

Obituary

Notes	Taught third grade for 31 years. Grew up in Tucson. Loved quilting and the lake.

Notes

EXAMPLE

SECTION 14

Letters & messages

Letters and messages for the people you love

IN THIS SECTION

14.1 Letters

14.2 Message

14

EXAMPLE

14 Letters & messages

Section 14
Letters and messages for the people you love

Letters

For whom	Daniel Alvarez (son), 555-0101; Sofia Alvarez (daughter), 555-0102
Where they are	Desk drawer, study

Message

Your message	You don't have to get everything right. Start with Section 2 and take it one call at a time. I love you both.

Notes

EXAMPLE

Things to find

Questions marked “come back later” or “not sure”. Tick each one when you’ve found it, then add it to the binder.

6. Insurance

- [ ] Long-term care · Not sure yet

9. Digital life

- [ ] Legacy contact · Come back later

- [ ]
- [ ]
- [ ]
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