



FREE FAMILY CHECKLIST

What your loved ones will need

When someone passes, families spend weeks hunting for papers, accounts, and contacts. Use this list now — while things are calm — so the people you love are not left guessing.



Key documents

- ☐ Will, trust, or estate plan (and where the originals are)
- ☐ Birth certificate, Social Security card, marriage license
- ☐ Deed, mortgage, or lease papers
- ☐ Vehicle titles and registration
- ☐ Military discharge papers (if any)
- ☐ Power of attorney and health-care directives



Money & accounts

- ☐ Bank and credit-union accounts
- ☐ Retirement accounts (401(k), IRA, pensions)
- ☐ Investment and brokerage accounts
- ☐ Credit cards and loans
- ☐ Safe-deposit box or home safe (and keys)
- ☐ Tax returns for the last 3 years



Insurance

- ☐ Life insurance policies and agent contacts
- ☐ Health, Medicare, or long-term care
- ☐ Homeowners or renters insurance
- ☐ Auto and umbrella policies
- ☐ Employer benefits that continue or pay out



People to call

- ☐ Executor or personal representative
- ☐ Attorney and accountant / tax preparer
- ☐ Primary doctor and pharmacy
- ☐ Employer or HR (if still working)
- ☐ Clergy, funeral home, or memorial preference
- ☐ Close friends who should hear from family first



Digital life & passwords

- ☐ Email accounts (personal and any work leftovers)
- ☐ Phone, computer, and tablet unlock codes
- ☐ Password manager or written password list location
- ☐ Social media, photo, and cloud storage accounts
- ☐ Streaming, shopping, and utility logins
- ☐ Tip: never email raw passwords — store them locked



Wishes & everyday life

- ☐ Funeral or celebration-of-life wishes
- ☐ Organ-donation preference
- ☐ Who should get keepsakes or pets
- ☐ Recurring bills and how they are paid
- ☐ A short farewell letter, if you want one
- ☐ Anything else your family would otherwise hunt for



A QUIETER NEXT STEP



If I Pass Away is a digital safe deposit box for **\$9.99/year**. You store a letter, passwords, and papers, then name a trusted contact. Even your trusted contact cannot open the vault until a death certificate confirms the passing.

Learn more at ifipassaway.com — set it once. We'll be there when your family needs it.

— The If I Pass Away Team

This checklist is general information, not legal advice. It is not a will, trust, or power of attorney. For legal documents, talk to a licensed attorney.