IN CASE I'M NOT HERE

***Note: If you'd like a copy of this file for your own use, simply go to "File – Make a Copy" and you'll have your own version for editing.*

***Note: To the extent you are using this document to store personal information and sensitive financial data, be extremely careful as to how and where you memorialize this document and its contents.*

- **PERSONAL NOTES**
  - A letter to your spouse/partner (encouragement, love, intentions, values)
  - A letter to children (if applicable)
  - How to interpret this document, the intentions behind it, etc
- **FIRST STEPS TO TAKE, WHEN READY**
  - **1 -** Call {ADVISOR} and {FAMILY MEMBER}, they will know the most about what to do in the event I am gone.
  - **2 -** Log in to the password manager using the credentials below.
  - **3 -** Make sure you can get into our main financial accounts for continuity.
  - **4 -** {PERSON/ATTORNEY} has a copy of our estate planning documents, which are also located in the {FIRE BOX / SAFE / ETC}
  - **5 -** {OTHER RELEVANT STEPS TO TAKE}
- **PASSWORDS AND LOGINS**
  - Password Manager: {LASTPASS / 1PASSWORD / ETC}
  - U: USERNAME
  - P: MASTER PASSWORD
- **CRITICAL DOCUMENTS & INSTRUCTIONS**
  - Estate Plan: Basic summary of the estate plan (who the trustee(s) are, how assets flow, and any instructions for dependents)
  - Digital Copies: Indicate where scanned versions are stored (e.g., cloud storage folder link).
  - Health Directives: Location of advance directives or living wills.
  - Location of Social Security Card / Passport / Birth Certificate.
- **SUBSCRIPTIONS / MEMBERSHIPS**
  - Streaming services: Netflix, Spotify, etc.
  - Memberships: Gym, Costco, AAA
  - Software/Cloud: iCloud, Dropbox, etc.
  - Review Annual/Recurring charges: Use {CREDIT CARD} statements or {BUDGETING APP}
- **DIGITAL ITEMS**
  - Phone Carrier & PIN
  - Social Media Accounts: Whether to memorialize, delete, or preserve

- Cloud Storage Services: (e.g., Google Drive, Dropbox, iCloud)
- Domain/Website Logins: If you own any

- **FINANCES**
  - Brokerage accounts, IRAs, & 401Ks at {CUSTODIAN} and {CUSTODIAN}
  - Bank accounts at {BANK}, {BANK}, and {BANK}
  - Credit cards with {CREDIT CARD COMPANY} and {CREDIT CARD COMPANY}
  - Crypto holdings {INFO}
  - All accounts are linked to {budgeting app} and {other financial app}
  - 529 Plan is held at {CUSTODIAN/STATE}
  - Spreadsheet with balance sheet, cash flow, and transactions {LINK}
  - Life insurance death benefit of {AMOUNT} through {INSURANCE COMPANY}
    - Monthly / Annual Premiums:
    - What you'll need to do to cash out the policy:
  - Other investments
    - Real estate:
    - Private investments:
    - Angel investments:

- **PROFESSIONAL TEAM CONTACT INFO**
  - Primary financial advisor:
    - {PHONE}
    - {EMAIL ADDRESS}
  - Estate planning attorney:
    - {PHONE}
    - {EMAIL ADDRESS}
  - Personal attorney:
    - {PHONE}
    - {EMAIL ADDRESS}
  - Life insurance agent:
    - {PHONE}
    - {EMAIL ADDRESS}
  - Accountant/CPA:
    - {PHONE}
    - {EMAIL ADDRESS}

- **PET CARE**
  - {VET CARE PROVIDER}
  - Food: _______
  - Medications: ________
  - Dogsitter: ________
  - Grooming: ________

- **MORTGAGE**
  - {MORTGAGE COMPANY}
  - Contact: ________
  - Website: ________

- PITI = $_____ / mo.

- **HOMEOWNERS INSURANCE**
  - {INSURANCE COMPANY}
  - Contact: ________
  - Website: ________

- **HOME SECURITY**
  - {SECURITY PROVIDER}
  - "Safe Word" = ________
  - Code to turn off alarm = ______

- **LANDSCAPING**
  - {COMPANY}
  - Contact: ________
  - Website: ________

- **PLUMBING**
  - {COMPANY}
  - Contact: ________
  - Website: ________

- **PEST CONTROL**
  - {COMPANY}
  - Contact: ________
  - Website: ________
  - $__/month

- **INTERNET**
  - {COMPANY}
  - Service: _______
  - Website: ________

- **CABLE TV**
  - {COMPANY}
  - $___/month

- **POWER**
  - {COMPANY}
  - Website: ________
  - $___/month

- **GAS**
  - {COMPANY}
  - Website: ________
  - $___/month

- **WATER**
  - {COMPANY}
  - Website: ________

        - $___/month

- **SEWER / REFUSE**
    - {COMPANY}
    - Website: _______
    - $___/month

- **HVAC**
    - {COMPANY}
    - Main Unit - Air Filter Last Replaced _____
    - Installed by ____
    - Warranty Info:

DISCLAIMER:

These tools and templates are provided for informational and educational purposes only. They have not been peer-reviewed, independently audited, or formally validated, and should not be used as the sole basis for client recommendations, investment decisions, formal financial plans, or regulatory filings. Users are responsible for verifying all outputs and calculations independently, ensuring compliance with applicable regulations and firm policies, exercising professional judgment before applying any results to client situations, and conducting appropriate due diligence before making any recommendations. No warranty is provided regarding the accuracy, completeness, or suitability of these tools for any particular purpose, and results may vary based on inputs, assumptions, and individual circumstances. Always consult with compliance, legal, and supervisory personnel before utilizing any analysis derived from these tools.

-Mark Cecchini, CFP®
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