



**YOUR  
DIGITAL  
LEGACY**

## 's Digital Legacy

### DATE OF LATEST UPDATE

### GENERAL INFO PART 01

**Name (include other names used in your life, eg, birth, first marriage, etc)**

**Address**

**Phone(s)**

**Email Address(es)**

**Where and When Born**

**Social Security Number**

**Spouse's Name, Birthplace and Date**

**Attach copies of those items that apply to you in Addendum Part 01:**

- **Birth Certificate**
- **Adoption Papers**
- **Citizenship Papers**
- **Prenup Agreement**
- **Marriage License**
- **Divorce Papers**
- **Passport**
- **Death Certificate for Spouse**
- **Military Discharge Papers**
- **Driver's License**
- **Power of Attorney**

# **Addendum Part 01 Worksheet**

- Birth Certificate**
- Adoption Papers**
- Citizenship Papers**
- Prenup Agreement**
- Marriage License**
- Divorce Papers**
- Passport**
- Death Certificate for Spouse**
- Military Discharge Papers**
- Driver's License**
- Power of Attorney**

## **Notes**

## **MEDICAL INFO PART 02**

**Medical Conditions, with Treatment Description**

**Medications, with Dosages**

**Name, Phone Numbers, and Specialties of Doctors**

**Allergies**

**Policy Number for All Health Insurance Policies**

**Name and Contact Info Of Your Appointed Agent(s), Along with Their Authority**

**Attach Copies of Items That Apply to You in Addendum Part 02:**

- **Living Will and Health Care Power of Attorney**
- **Do Not Resuscitate Order**
- **Organ/Body Donor Info**
- **Medical Orders for Life-Sustaining Treatment**
- **Hospital Visitation Authorization Form (ensures visitation rights for those who might not meet hospital's definition of a family member)**
- **HIPAA Form (says who can see your medical records)**

# **Addendum Part 02a Worksheet**

**Medical Condition(s)**

**Medication List**

**Name, Specialty and Phone Number(s) of Doctors**

# **Addendum Part 02b Worksheet**

**Health Insurance Papers**

**Living Will and Health Care POA**

**Do Not Resuscitate Order**

**Organ Donor Info**

**M/O for Life-Sustaining Treatment**

**HIPAA Form (says who can see your  
medical records)**

**Hospital Visitation Authorization Form**

**Notes**

### **REAL ESTATE PART 03**

**List of All Real Estate.**

**Where to Obtain Extra Set of House Keys**

**Alarm Contract, Account Number, and Password**

**Any Info Helpful for House Sale (e.g., significant improvements made, warranty information, list of service people plumber , HVAC, etc. with contact info)**

**Attach Copies of Those Items That Apply to You In Addendum Part 03:**

- **Copies of Deed(s), Mortgage(s), Insurance, and/or Appraisals**

### **AUTO(s) PART 04**

**List of Make, Model, Year, VIN**

**Title, Lease/Loan Info**

**Auto Insurance Account Number(s)**

**Where Serviced**

**Attach Copies of Those Items That Apply to You in Addendum Part 04:**

- **Auto Title, Lease/Loan Info**
- **Auto Insurance Info**

# **Addendum Part 03 Worksheet**

- Copies of Deeds, Mortgages, Insurance, and/or Appraisals**

**Notes**



# **Addendum Part 04 Worksheet**

**Auto Title, Lease/Loan Info**  
**Auto Insurance Info**

**Notes**

## **PERSONAL PROPERTY PART 05**

### **Specific Instructions of Who Gets What, If Not Included In Will**

**Location Information for Items Not In Your home (e.g. location of storage unit, pass-words, location of key or items "on loan" to someone else)**

**List of Firearms (description, location of item(s))**

**Location of Any Hidden Valuables (e.g., do you have money hidden in house or car for emergencies?)**

**Appraisals of Valuables**

**Attach Copies of Those Items That Apply to You In Addendum Part 05:**

- **Copy of Gun License or Bill of Sale**
- **Documentation/Combination of Storage Units/Safe(s)**

## **PET(s) PART 06**

**Health, Vet Contact Info, What It Eats, Who Should Inherit Him/Her, etc.**

**Attach Copies of Those Items That Apply to You in Addendum Part 06:**

- **Pet Health Info**

# **Addendum Part 05 Worksheet**

- Copy of Gun License or Bill of Sale**
- Documentation/Combination of Storage Units/Safe(s)**

**Notes**

# **Addendum Part 06 Worksheet**

**Pet Info**

**Notes**

## **FINANCIAL PART 07**

**Names and Contact Info for Account, Financial Advisor, and/or Tax Preparer**

**Account Numbers and Passwords for All Bank Accounts and /or Retirement Accounts,**

**Credit Cards**

**Rewards Programs**

**List of Current Loans**

**Mortgage Company and Account Info**

**Other Home Loans**

**Car**

**Student**

**Personal**

**Judgments**

**Full Details of Money Owed to You, Such as Loans or Security Deposits**

**Safe Deposit Box and/or Storage Unit Info**

**Account Numbers and Passwords for Utilities, Subscriptions, Memberships, etc.**

**Attach copies of those items that apply to you in Addendum Part 07:**

- **Last Several Tax Returns**
- **Loan Documents**
- **Mortgage Document**

# **Addendum Part 07 Worksheet**

**Last Several Tax Returns**

**Loan Document(s)**

**Mortgage Document(s)**

**Notes**

## **INCOME and EXPENSES PART 08**

### **Source of Income and Amount**

**Attach Copies of Those Items That Apply to You In Addendum Part 09:**

- **Detailed Monthly Expenses**

## **INVESTMENTS PART 09**

**List of All investment Account(s), Account Number(s), and/or Password(s)**

**List of Pension Type and Account Numbers**

**Social Security Account Number, Log In Info**

**Attach Copies of Those Items That Apply to You in Addendum Part 09**

- **Investment Documents**
- **Pension Documents**
- **Social Security Card**

# **Addendum Part 08 Worksheet**

**Detailed Monthly Expenses**

**Notes**



# **Addendum Part 09 Worksheet**

- Investment Documents**
- Pension Documents**
- Social Security Card**

**Notes**

## **TECHNOLOGY 10**

**List of All Digital Devices Include Credentials**

**List of Email Accounts Include Credentials**

**List of Social Media Accounts Include Credentials**

**Do You Use a Password Manager**

**Yes      No**

**If Yes Cite Company and Credentials**

**List of Shopping Accounts/Sites Include Credentials**

**List of Online Photo Albums Include Credentials**

**List of Online Movie/Music Sites Include Credentials**

**List of Online Gambling Sites Include Credentials**

**List of Online Book/Audiobook Sites Include Credentials**

# **Addendum Part 10 Worksheet**

**Digital Device(s) List**

**Email Account(s) List**

**Social Media Account(s) List**

**Banking Account(s) List**

**Investment Site(s)**

**Shopping Site(s)**

**Photo Site(s)**

**Movie/Music Site(s)**

**Gambling Site(s)**

**Library/AudioBook Site(s)**

**Notes**

## **END of LIFE PART 11**

**Do You Have a Will**

**Y( Yes No**

**If Yes When Was the Last Time It Was Updated?**

**What Will Matter Most to You at the End of Your Life?**

**What Kind of Funeral Arrangements Do You Want, If Any?**

**Information on Your Desired Final Wishes**

**Information Commonly Included in Death Announcements and Obits**

# **Addendum Part 11 Worksheet**

**Final Wishes**

**Last Will and Testament**

**Notes**