

Documents to Gather Before You Start Your Everplan

Take your planning to the next level.

Getting Started

Here are some of the essential documents, accounts, and types of information you should organize and have at the ready before setting up an Everplan. By gathering all this essential information, you'll be ready to take your planning to the next level, and be prepared for anything.

This checklist includes the following:

- Important Contacts
- Important & Official Documents
- Financial Accounts & Assets
- Home & Vehicle Information
- Personal Identification
- Digital Estate & Asset Information



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IMPORTANT CONTACTS

- Emergency Name/Info: _____
- Work Name/Info: _____
- Doctor Name/Info: _____
- Financial/Accountant Name/Info: _____
- Insurance Agent Name/Info: _____
- Lawyer Name/Info: _____
- Other Name/Info: _____
- Other Name/Info: _____

OFFICIAL DOCUMENTS

- Advance Health Care Directive
- Trusts
- Insurance Policy
- Power Of Attorney
- Will
- Other:

IDENTIFICATION / VITAL DOCUMENTS

- Birth Certificate
- Social Security Card
- Passport
- Marriage Certificate
- Other (Example: Club Memberships, State ID card, etc.):
- Driver's License
- Armed Forces ID / Discharge
- Papers Citizenship Documentation
- Divorce Decree / Settlement Info



INSURANCE INFO

- | | | |
|--|---|---|
| <input type="checkbox"/> Life Insurance | <input type="checkbox"/> Health Insurance | <input type="checkbox"/> Car Insurance |
| <input type="checkbox"/> Home Insurance | <input type="checkbox"/> Renter's Insurance | <input type="checkbox"/> Long-Term Care Insurance |
| <input type="checkbox"/> Funeral Insurance | <input type="checkbox"/> Disability Insurance | <input type="checkbox"/> Disaster Insurance |
- Other Insurance Policies (Example: Umbrella, Personal Articles, etc.):
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BANK ACCOUNTS / MORTGAGE / LOANS

Have a recent account statement for each, location of related items (example: checkbooks, passbooks), and account/login and password for online management.

- | | |
|--|---|
| <input type="checkbox"/> Checking | <input type="checkbox"/> Savings |
| <input type="checkbox"/> Money Market | <input type="checkbox"/> Certificate Of Deposit (CDs) |
| <input type="checkbox"/> Mortgage Info | <input type="checkbox"/> Loan Info |
- Other (Example: Debit Card, Promissory Note, etc.):
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CREDIT CARDS

Have a recent account statement for each account and login/password for online management.

- | | | |
|---|----------------------|------------------|
| <input type="checkbox"/> American Express | Last 4 Digits: _____ | Exp. Date: _____ |
| <input type="checkbox"/> Discover | Last 4 Digits: _____ | Exp. Date: _____ |
| <input type="checkbox"/> Mastercard | Last 4 Digits: _____ | Exp. Date: _____ |
| <input type="checkbox"/> Visa | Last 4 Digits: _____ | Exp. Date: _____ |
- Other:
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INVESTMENTS / PENSIONS / BENEFITS

Have a recent statement for each account, as well as login info and password for online management.

- | | |
|---|--|
| <input type="checkbox"/> Stocks | <input type="checkbox"/> Bonds |
| <input type="checkbox"/> Mutual Funds | <input type="checkbox"/> Military Benefits |
| <input type="checkbox"/> 401(k) | <input type="checkbox"/> 403(b) |
| <input type="checkbox"/> IRA | <input type="checkbox"/> Roth IRA |
| <input type="checkbox"/> Pension (SEP / SARSEP) | <input type="checkbox"/> 529/College Savings |
| <input type="checkbox"/> Other (Example: Trust Fund, Specific Employee Benefits, etc.): | |
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PROPERTY DEEDS / TITLES

- | | |
|--|--|
| <input type="checkbox"/> Real Estate (owned) | <input type="checkbox"/> Real Estate (rented/leased) |
| <input type="checkbox"/> Motor Vehicles | <input type="checkbox"/> Boats |
| <input type="checkbox"/> Other: | |
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HOUSEHOLD UTILITIES

Have a recent account statement for each utility, as well as contact info if applicable.

- | | |
|---|---|
| <input type="checkbox"/> Electricity | <input type="checkbox"/> Gas |
| <input type="checkbox"/> Water | <input type="checkbox"/> Heating Oil |
| <input type="checkbox"/> Phone | <input type="checkbox"/> HVAC |
| <input type="checkbox"/> Cable | <input type="checkbox"/> Septic |
| <input type="checkbox"/> Internet | <input type="checkbox"/> Garbage |
| <input type="checkbox"/> Landscaping | <input type="checkbox"/> Cleaning Service |
| <input type="checkbox"/> Plumber | <input type="checkbox"/> Exterminator |
| <input type="checkbox"/> Electrician | <input type="checkbox"/> Home Automation |
| <input type="checkbox"/> Other (Example: Decorator, Pool Cleaner, etc.) | |
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UNLOCKING ELECTRONICS / SECURITY

Ensure someone you trust knows how to access the following.

- Mobile Phone
- Computer(s)
- Tablet
- Home Security
- Password Manager
- Wi-Fi
- Other:

DIGITAL ACCOUNTS / SERVICES

Be prepared to identify all of the following digital accounts and services you use.

- Email
- Entertainment (Video / Music / Gaming)
- Cloud Storage
- Food / Delivery
- Health / Medical (medication)
- Messaging / Voice-over-IP
- Money Management
- Shopping
- Social Media
- Software Licenses
- Travel / Ticketing
- Web Hosting / Blogging
- Other (Example: Photography, Organization, Productivity, etc.):

MISCELLANEOUS IMPORTANT INFO

- Dependents (Children, Special Needs)
- Magazine/Newspaper Subscriptions
- Pets (Vet, Diet, Guardian, Insurance)
- Collectibles (coins, stamps, memorabilia)
- Other:



LEGACY / AFTER I'M GONE

Things you should think about even if you haven't done any planning yet.

- Decide among: Burial / Cremation / Donation
- Funeral / Memorial Preferences
- Contracts / Prepaid Arrangements (Example: cemetery plot information)
- Obituary Preferences and info, which typically includes:
 - o Date/place of birth: _____
 - o Date/place of marriage: _____
 - o Parents' names: _____
 - o Education (schools/degrees): _____
 - o Military/Public service (honors, awards, achievements):

 - o Employment (titles, awards, achievements):

 - o Organization affiliations (religious, cultural, civic):

 - o Special accomplishments: _____
 - o Hobbies and Interests: _____
- Letters For Family/Friends (list names of people you want to write a personal letter)



