

# Information Should You Become Incapacitated or Die

(copies of this form can be found at [PrettyHandyGirl.com/important-questions-to-ask-loved-ones](http://PrettyHandyGirl.com/important-questions-to-ask-loved-ones))

Date: \_\_\_\_\_

Dear \_\_\_\_\_,

Please know that I love you and hope I never need this information. Having the information in this document will make it easier for me to care for you should you be unable to communicate with me. I promise to store this information in a safe place and only refer to it if you become incapacitated or die. You can also put it in a sealed envelope with instructions to open if incapacitated or deceased.

Love,

## 1. LEGAL DOCUMENTS

Do you have a recent will\*? \_\_\_\_\_ Date of Most Recent Version: \_\_\_\_\_

Attorney's Name: \_\_\_\_\_ Attorney's Contact Info: \_\_\_\_\_

Do you have Power-of-Attorney designated for financial matters\*: \_\_\_\_\_

Do you have a Medical Power-of-Attorney\*: \_\_\_\_\_

Who is the executor: \_\_\_\_\_

\*If you don't, I highly recommend you create a will and designate a power of attorney.

## 2. MEDICAL INFO AND ADVANCED DIRECTIVES

Do you have an advanced medical directive (instructions should you be on life support): \_\_\_\_\_

If not, can you specify your desires if you are incapacitated, on life support, or considered terminal? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Do you have any medical issues a doctor should know about if you can't speak for yourself? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Is there any medication you take regularly that needs to be administered? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Who is your primary care physician? \_\_\_\_\_

Physician's contact info: \_\_\_\_\_

### 3. FINANCIALS AND INVESTMENTS

Financial institutions where you have accounts. If you don't feel comfortable giving log in and password information, please let me know where I can access this information if you are incapacitated or die.

Bank name: \_\_\_\_\_ Account number: \_\_\_\_\_

Contact info: \_\_\_\_\_

Login: \_\_\_\_\_ Password: \_\_\_\_\_

Bank name: \_\_\_\_\_ Account number: \_\_\_\_\_

Contact info: \_\_\_\_\_

Login: \_\_\_\_\_ Password: \_\_\_\_\_

Bank name: \_\_\_\_\_ Account number: \_\_\_\_\_

Contact info: \_\_\_\_\_

Login: \_\_\_\_\_ Password: \_\_\_\_\_

Bank name: \_\_\_\_\_ Account number: \_\_\_\_\_

Contact info: \_\_\_\_\_

Login: \_\_\_\_\_ Password: \_\_\_\_\_

#### **Investment Accounts:**

Company name: \_\_\_\_\_ Account number: \_\_\_\_\_

Contact info: \_\_\_\_\_

Login: \_\_\_\_\_ Password: \_\_\_\_\_

Company name: \_\_\_\_\_ Account number: \_\_\_\_\_

Contact info: \_\_\_\_\_

Login: \_\_\_\_\_ Password: \_\_\_\_\_

Company name: \_\_\_\_\_ Account number: \_\_\_\_\_

Contact info: \_\_\_\_\_

Login: \_\_\_\_\_ Password: \_\_\_\_\_

Are there any other investments I should be aware of? Private equity, direct company investments, crypto currency, offshore accounts, etc.? \_\_\_\_\_

If yes, please share institution and account numbers: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**SAFETY DEPOSIT BOX OR SAFE?**

Do you have a Safety Deposit Box? \_\_\_\_\_ Box#: \_\_\_\_\_

Bank or Location of Box: \_\_\_\_\_ Where is the Key? \_\_\_\_\_

Do you have a safe? \_\_\_\_\_ Location: \_\_\_\_\_

Combination: \_\_\_\_\_

Is it a standard lock or are there any specific tips for accessing the safe? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**5.LIFE INSURANCE, PENSIONS, SOCIAL SECURITY:**

Do you have any life insurance policies? \_\_\_\_\_

Policy Title: \_\_\_\_\_ Policy #: \_\_\_\_\_

Agent Contact Info: \_\_\_\_\_ Term Policy? \_\_\_\_\_ If so, expiration: \_\_\_\_\_

Policy Title: \_\_\_\_\_ Policy #: \_\_\_\_\_

Agent Contact Info: \_\_\_\_\_ Term Policy? \_\_\_\_\_ If so, expiration: \_\_\_\_\_

Policy Title: \_\_\_\_\_ Policy #: \_\_\_\_\_

Agent Contact Info: \_\_\_\_\_ Term Policy? \_\_\_\_\_ If so, expiration: \_\_\_\_\_

**Pensions, 401K, IRA, or Other:**

Company: \_\_\_\_\_ Account #: \_\_\_\_\_

Contact Info: \_\_\_\_\_

Company: \_\_\_\_\_ Account #: \_\_\_\_\_

Contact Info: \_\_\_\_\_

Company: \_\_\_\_\_ Account #: \_\_\_\_\_

Contact Info: \_\_\_\_\_

**IMPORTANT DOCUMENTS:**

In an emergency, where can I find your birth certificate, social security card, (if applicable) marriage certificate, divorce certificate, military discharge documents, and birth certificate? \_\_\_\_\_

\_\_\_\_\_

What's your Social Security Number? \_\_\_\_\_

**House:**

Do you have a house title? \_\_\_\_\_ If yes, where is it stored? \_\_\_\_\_

If no, mortgage company: \_\_\_\_\_ Loan #: \_\_\_\_\_

Contact information: \_\_\_\_\_

**Other Properties or Land:**

Do you have a title? \_\_\_\_\_ If yes, where is it stored? \_\_\_\_\_

If no, loan company: \_\_\_\_\_ Loan #: \_\_\_\_\_

Contact information: \_\_\_\_\_

**Vehicles:**

Do you have your vehicle title(s): \_\_\_\_\_ If yes, where are they stored? \_\_\_\_\_

Car Make and Model: \_\_\_\_\_

If no title, auto loan bank: \_\_\_\_\_ Loan#: \_\_\_\_\_

Contact Info: \_\_\_\_\_

Car Make and Model: \_\_\_\_\_

If no title, auto loan bank: \_\_\_\_\_ Loan#: \_\_\_\_\_

Contact Info: \_\_\_\_\_

Car Make and Model: \_\_\_\_\_

If no title, auto loan bank: \_\_\_\_\_ Loan#: \_\_\_\_\_

Contact Info: \_\_\_\_\_

**Recreational Vehicles:**

Vehicle Make and Model: \_\_\_\_\_ Where is the title stored? \_\_\_\_\_

If no title, loan bank: \_\_\_\_\_ Loan#: \_\_\_\_\_

Contact Info: \_\_\_\_\_

**Other Assets:** \_\_\_\_\_

**CREDIT CARD AND DEBTS**

Credit card information:

Credit Card Name: \_\_\_\_\_ Account number: \_\_\_\_\_

Login: \_\_\_\_\_ Password: \_\_\_\_\_

Outstanding debts:

Any recurring expenses and payments?: \_\_\_\_\_

Institution: \_\_\_\_\_ Account #: \_\_\_\_\_

Contact Info: \_\_\_\_\_

Any recurring expenses and payments?: \_\_\_\_\_

Institution: \_\_\_\_\_ Account #: \_\_\_\_\_

Contact Info: \_\_\_\_\_

Any recurring expenses and payments?: \_\_\_\_\_

Institution: \_\_\_\_\_ Account #: \_\_\_\_\_

Contact Info: \_\_\_\_\_

**PASSWORDS**

Finally, and most importantly, do you have a file or somewhere that I can access your passwords in an emergency?

\_\_\_\_\_

Or do you feel comfortable listing your current passwords here?

Computer: \_\_\_\_\_ Cell phone: \_\_\_\_\_

Email: \_\_\_\_\_ Other: \_\_\_\_\_

Do you use a secure single password software program that manages all your passwords like:

1Password, BitWarden, or Dashlane?

Program: \_\_\_\_\_ Username: \_\_\_\_\_ Password: \_\_\_\_\_

**ADDITIONAL ARRANGEMENTS**

What would you like or not like for your funeral service? \_\_\_\_\_

---

---

---

---

---

Have you pre-paid for a service with any funeral home or cremation society? \_\_\_\_\_

---

---

Do you have a charity where you'd like donations made in your honor? \_\_\_\_\_

---

---

---

Is there anything you want me to know after you are gone? \_\_\_\_\_

---

---

---

---

Any special requests for your possessions? Anything in particular you want to gift to someone? \_\_\_\_\_

---

---

---

---

---

---

---

---

Additional notes: \_\_\_\_\_

---

---

---