



# Get Organized Guide

Congratulations on your decision to plan ahead for your end-of-life! You are well on your way to peace of mind and relieving your family from making difficult decisions.

This Get Organized Guide is designed to help your loved ones contact important people in your life for critical information and/or to let them know of your passing and any final ceremony details.

It also includes a checklist to help you keep track of your progress as you go, as well as a workbook to help document your decision.

Often, finding contact information is very difficult for loved ones and completing this guide will relieve them of that stress. **It's important to keep this guide in a safe place with your other important documentation.**

Contact details can also change and important people can enter our lives at any time. Remember to update this guide when someone's contact details change.

## Checklist

- Identify important contacts who need to be notified of your death
- Identify important contacts who can help my loved ones with my estate and final matters
- Compile all your important documentation and make extra copies



# Workbook

## IMPORTANT CONTACTS:

When I die, please notify the following people immediately:

1. Name: \_\_\_\_\_
  - a. Contact: \_\_\_\_\_
  - b. Relationship: \_\_\_\_\_
2. Name: \_\_\_\_\_
  - a. Contact: \_\_\_\_\_
  - b. Relationship: \_\_\_\_\_
3. Name: \_\_\_\_\_
  - a. Contact: \_\_\_\_\_
  - b. Relationship: \_\_\_\_\_
4. Name: \_\_\_\_\_
  - a. Contact: \_\_\_\_\_
  - b. Relationship: \_\_\_\_\_
5. Name: \_\_\_\_\_
  - a. Contact: \_\_\_\_\_
  - b. Relationship: \_\_\_\_\_

Next, please notify the following family members and loved ones:

1. Name: \_\_\_\_\_
  - a. Contact: \_\_\_\_\_
2. Name: \_\_\_\_\_
  - a. Contact: \_\_\_\_\_
3. Name: \_\_\_\_\_
  - a. Contact: \_\_\_\_\_
4. Name: \_\_\_\_\_
  - a. Contact: \_\_\_\_\_
5. Name: \_\_\_\_\_
  - a. Contact: \_\_\_\_\_
6. Name: \_\_\_\_\_
  - a. Contact: \_\_\_\_\_



7. Name: \_\_\_\_\_  
a. Contact: \_\_\_\_\_
8. Name: \_\_\_\_\_  
a. Contact: \_\_\_\_\_
9. Name: \_\_\_\_\_  
a. Contact: \_\_\_\_\_
10. Name: \_\_\_\_\_  
a. Contact: \_\_\_\_\_

Other friends, relatives, and colleagues:

1. Name: \_\_\_\_\_  
a. Contact: \_\_\_\_\_
2. Name: \_\_\_\_\_  
a. Contact: \_\_\_\_\_
3. Name: \_\_\_\_\_  
a. Contact: \_\_\_\_\_
4. Name: \_\_\_\_\_  
a. Contact: \_\_\_\_\_
5. Name: \_\_\_\_\_  
a. Contact: \_\_\_\_\_
6. Name: \_\_\_\_\_  
a. Contact: \_\_\_\_\_
7. Name: \_\_\_\_\_  
a. Contact: \_\_\_\_\_
8. Name: \_\_\_\_\_  
a. Contact: \_\_\_\_\_
9. Name: \_\_\_\_\_  
a. Contact: \_\_\_\_\_
10. Name: \_\_\_\_\_  
a. Contact: \_\_\_\_\_



## Key Contacts

- Lawyer: \_\_\_\_\_
- Financial advisor: \_\_\_\_\_
- Family doctor: \_\_\_\_\_
- Workplace: \_\_\_\_\_
- Accountant: \_\_\_\_\_
- Insurance advisor(s):  
\_\_\_\_\_
- Landlord: \_\_\_\_\_
- Veterinarian: \_\_\_\_\_
- Member organizations (military, volunteer, sports groups, clubs, associations, civic, religious, etc.):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Celebrant/Religious Leader: \_\_\_\_\_
- Other: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



## IMPORTANT DOCUMENTS:

- Compile the following important documents and make extra copies:
  - Birth certificate
  - Social security card
  - Passport
  - Driver's license
  - Citizenship documents
  - Funeral Plans (including any burial plots, insurance policies or pre-paid arrangements)
  - Marriage certificate and/or divorce record
  - Last will and testament
  - Statements for banking, retirement, investment, credit and loan accounts
  - Passwords and PIN to all accounts
  - Insurance policies
  - Deeds or proof of ownership for home, car, etc.
  - Business-related documents
  - Lease or rental agreement
  - List of automatic payments (ex. Gym membership)
  - Government benefit statements (Social Security, Veterans benefits, etc)
  - Military ID
  - List of assets
  - Deeds or Mortgages

## Next steps:

All done? Pat yourself on the back! You've just completed a huge step on your end-of-life planning journey. One step closer to peace of mind! Check off the Get Organized Guide on your Planning Ahead Checklist, and let's move on to any other Guides you're ready to complete.

**Don't forget to store this completed checklist safely and securely, where loved ones could access it when needed.**