# Next of kin box: the category sheet

Fifteen folders, in this order. Tick each one when it is filled. Write where it is kept. This page goes at the front of the box.

**This box belongs to** _____ **Last checked** _____ MM / DD / YYYY

| Filled | Folder, and what goes in it | Where it is kept |
|---|---|---|
| ☐ | 1 **Identity and vital records** Birth certificate · Social Security card · Passport · Driver's license or state ID · Marriage certificate · Divorce decree · Citizenship certificate · DD 214 · Adoption or name-change order · Death certificates you hold | |
| ☐ | 2 **The will, trust and powers of attorney** The will · Any later change to it · A living trust · Financial power of attorney · A letter of instruction · A guardian named for children | |
| ☐ | 3 **Health care directives** Living will or advance directive · Health care power of attorney · DNR or POLST order · HIPAA authorization · Donor registration | |
| ☐ | 4 **People to call** The first three people to call · The executor · Attorney · Accountant · Financial advisor and insurance agent · Employer or pension contact · Doctor and pharmacy · Friends, faith community, the neighbor with keys | |
| ☐ | 5 **Money: bank, retirement, investments, debts** Checking and savings accounts · Joint accounts · Payable-on-death names · Retirement accounts · Brokerage and investment accounts · Savings bonds · Old pensions and lost accounts · Debts | |
| ☐ | 6 **Insurance** Life insurance · Life insurance through work · Health insurance and Medicare supplement plans · Long-term care and disability insurance · Home, renters and auto insurance · Annuities | |
| ☐ | 7 **Home, vehicles and titles** The deed to the home · Mortgage and home equity papers · A transfer-on-death deed · The lease · Vehicle titles and registration · Property tax bills · Other property · A home inventory and appraisals | |
| ☐ | 8 **Taxes** Federal income tax returns · State income tax returns · Your tax preparer · An IRS identity protection PIN (where it is kept, not the number) | |
| ☐ | 9 **Social Security, Medicare and veterans' benefits** Social Security statement or award letter · Medicare card · VA benefit letters and claim number · A VA burial decision made ahead · Other federal pensions | |
| ☐ | 10 **Employment and pension** Your employer · Benefits at work · Pension plans, past and present · Union or professional memberships | |
| ☐ | 11 **Digital accounts and devices** The phone (who can unlock it) · Apple Legacy Contact · Google Inactive Account Manager · The main email address · The password manager (which one) · The codes device and recovery codes (where they are) · Social media, photos and cloud storage · Subscriptions | |
| ☐ | 12 **Pets** The veterinarian · Vaccination records and the license · The microchip number · Who has agreed to take them | |
| ☐ | 13 **Funeral and final wishes** Burial, cremation or donation · A prepaid plan or burial policy · A cemetery plot · The funeral home, if chosen · Military honors · The service | |
| ☐ | 14 **Business interests** Formation papers · The employer identification number letter · A buy-sell or succession agreement · Business accounts, licenses and permits · Who can run it tomorrow | |
| ☐ | 15 **Where the originals and the keys are** A home safe or fireproof box · A safe deposit box · Papers held by an attorney · Keys · This sheet · Who has been told | |

**Two people who know where this box is**

_____ _____

**The signed original of the will is kept at**

_____

**Leave out passwords, PINs and full account numbers. Write the route, not the key: where the password manager is, and who can reach it.**

Put a copy of each paper in its folder, and one line saying where the original is.

Prepared and checked by Valoren, a publisher in London, England. No attorney has reviewed it. General information, not a substitute for the advice of an attorney.
The full list, with the office each paper comes from: theendoflifeplanner.com/us/next-of-kin-box-template
Checked November 10, 2026. Free to print and copy for your own household.