The End of Life Planner

UNITED STATES

FREE · GENERAL INFORMATION

LARGE PRINT EDITION · FILL IN ON SCREEN

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

Folder, and what goes in it

1 Identity and vital records — Filled ☐

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

Where it is kept

_____

2 The will, trust and powers of attorney

Filled ☐

The will · Any later change to it · A living trust · Financial power of attorney · A letter of instruction · A guardian named for children

Where it is kept

3 Health care directives

Filled ☐

Living will or advance directive · Health care power of attorney · DNR or POLST order · HIPAA authorization · Donor registration

Where it is kept

4 People to call

Filled ☐

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

Where it is kept

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5 Money: bank, retirement, investments, debts

Filled ☐

Checking and savings accounts · Joint accounts · Payable-on-death names · Retirement accounts · Brokerage and investment accounts · Savings bonds · Old pensions and lost accounts · Debts

Where it is kept

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6 Insurance

Filled ☐

Life insurance · Life insurance through work · Health insurance and Medicare supplement plans · Long-term care and disability insurance · Home, renters and auto insurance · Annuities

Where it is kept

7 Home, vehicles and titles

Filled ☐

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

Where it is kept

8 Taxes

Filled ☐

Federal income tax returns · State income tax returns · Your tax preparer · An IRS identity protection PIN (where it is kept, not the number)

Where it is kept

9 Social Security, Medicare and veterans' benefits

Filled ☐

Social Security statement or award letter · Medicare card · VA benefit letters and claim number · A VA burial decision made ahead · Other federal pensions

Where it is kept

10 Employment and pension

Filled ☐

Your employer · Benefits at work · Pension plans, past and present · Union or professional memberships

Where it is kept

11 Digital accounts and devices

Filled ☐

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

Where it is kept

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12 Pets

Filled ☐

The veterinarian · Vaccination records and the license · The microchip number · Who has agreed to take them

Where it is kept

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13 Funeral and final wishes

Filled ☐

Burial, cremation or donation · A prepaid plan or burial policy · A cemetery plot · The funeral home, if chosen · Military honors · The service

Where it is kept

14 Business interests

Filled ☐

Formation papers · The employer identification number letter · A buy-sell or succession agreement · Business accounts, licenses and permits · Who can run it tomorrow

Where it is kept

15 Where the originals and the keys are

Filled ☐

A home safe or fireproof box · A safe deposit box · Papers held by an attorney · Keys · This sheet · Who has been told

Where it is kept

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.