

Letter to Survivors

This should include the following:

Medical wishes including location of Power of Attorney for Health Care (this should already be filed with your doctor and trustee) and who is to make decisions. Make sure you have talked to your family about health care decisions so that they understand your wishes. List doctors, insurance and other information such as automatically renewed prescriptions.

Final wishes for funeral or cremation.

List of passwords. Hopefully you are using a password manager so all you need to leave are the passwords for your computer and password manager. If you have a list of passwords, indicate its location. If you have neither you need to do so. Multiple sheets of paper, sticky notes and notepads are not a good way to store your passwords. Be sure to include the password(s) for phones, tablets or other devices that have a password, pin or other login method.

Attorney or other person who has documents such as Will, Trust, Power of Attorney for Financial and who will help with your estate.

Location of important documents such as a Safe (be sure to provide combination or key location), file cabinet, under the bed, lawyer, trusted friend or wherever.

List of important documents and possessions: Will, Trust (California probate can trigger with as little as \$150,000 of separate assets), Passport, Military Separation, Birth certificates, Marriage certificates, divorce certificates, Social Security Card (never keep it on you), Life Insurance policies, Deeds, Certificates of Ownership (car, boat, trailer), Stock and Bond Certificates (or where the accounts are), CD's, Retirement accounts, Cash, Jewelry, antiques and collectibles and any other important items.

Financial information such as Bank accounts, investments, retirement accounts, property, insurance (home, auto, health etc.). Include contact information for each of these if you have a specific person or department you work with.

Anything else that they may need to know such as pets (care and who gets them), who can handle funeral, estate agents, contractors, realtors etc.

Billing Information

Company	Service	Acct#	Billing Method	Due Date	Payment Method
Visa	Credit Card	12345678901234	Via email	14 th	Bank bill pay
Mastercard	Credit Card	98765432109876	Via email	19th	Bank bill pay
Town of Windsor	Utilities	7654321	Via email	Bi-monthly 14th	Auto deduct from checking
PGE	Utilities	112-345-678	Via e-mail	26th	Bank bill pay
Sonoma Refuse	Trash	876-789-1234	mail	11 th (every 3 mo.)	Auto Visa credit card
Comcast	TV internet	42-55476-0001	Via email	19 th	Auto Visa credit card
Wells Fargo	House payment	76765-11435	Via email	11 th	Auto deduct from checking
Verizon	Cell phone	978-778909-1123	Via email	22 nd	Auto Visa credit card