

Legacy Drawer Checklist

List of Important Contacts
*Close family members, Attorney,
Financial Advisor, accountant,
doctors*

Tax Returns

Digital Access Information
*Passwords, usernames, security
questions and PINS for online
and social accounts.*

Monthly Financial Snapshot
*Recurring expenses, subscriptions,
automatic payments*

Medications List
Dosages and doctors

List of Financial Accounts
*The names, numbers, passwords
and balances of all your Bank
account, 401k, IRA, etc.*

Burial and Service
Instructions

Legacy Letters
*Personal letters to your
loved one*

Safe Deposit Box Info
*Location and access
instructions*

Insurance Policies
Health, Auto, Life

IMPORTANT DOCUMENTS

Birth Certificate

Marriage Certificate

Deeds and titles to
things you own

Social Security Cards

Military Discharge
Papers/DD-14

Your estate plan
Will, trust, powers of attorney