

Recurring Bills & Automatic Payments

This page helps someone see what continues to be charged and which account or card is paying it.

Recurring payments

Bill / Company	How Often	Paid From Last 4	Account / Records Location

DO NOT CANCEL EVERYTHING AT ONCE

Utilities, insurance, mobile phones, cloud storage, security services, and other accounts may need to stay active temporarily. Review what each service supports before making changes.

Financial Documents Master Locator

Use this page as the quickest route to the records your family or representative may need.

FIND IT FAST

Account / Document / Asset	Exact Location	Contact / Note

BE SPECIFIC

A useful entry might say: "2026 retirement statements - home office - black file cabinet - second drawer - folder marked RETIREMENT."

Before Anything Is Cancelled

Some accounts or services may still be needed for communication, security, records, or access.

Do not cancel these right away without checking

- ☐ Primary email account
- ☐ Mobile phone service
- ☐ Internet service
- ☐ Cloud photo or file storage
- ☐ Homeowners / renters / auto insurance
- ☐ Home security or monitoring
- ☐ Utilities needed to protect the property
- ☐ Other important service

Digital & Household Master Locator

Account / Record / Item	Exact Location	Contact / Note

Chapter 6 Quick Check

- ☐ Someone I trust knows where secure digital-access instructions are kept.
- ☐ I listed my important email accounts, devices, and online accounts.
- ☐ I recorded where photos, files, and digital memories are stored.
- ☐ I listed recurring bills, utilities, subscriptions, and household providers.
- ☐ I recorded important home-system, key, maintenance, and warranty information.

Pet Care Profile

Complete one profile for each pet. Extra copies can be kept with this planner or downloaded from the Resource Center.

About my pet

Pet's name

Type / breed

Age / birth date

Color / identifying marks

Microchip company

Microchip number - last 4 if preferred

Veterinary care

Veterinarian / clinic

Phone

Veterinarian / clinic address

Emergency veterinary clinic

Phone

Emergency veterinary clinic address

Food & daily routine

Food, amount, feeding times, treats, and anything to avoid

Walks, litter, exercise, sleep, or other daily routine

Dependent Care Profile

Use this page for a child, adult family member, or another person who depends on you for regular care, supervision, or support.

About this person

Full name

Relationship to me

Date of birth

Primary language / communication

Home address, if different from mine

Primary phone, if applicable

Alternate phone, if applicable

Primary caregiver or support person

Name

Relationship / role

Phone

Email

Address, if useful

Backup caregiver or support person

Name

Relationship / role

Phone

Email

Address, if useful

Where legal caregiving, guardianship, custody, or authorization documents are kept, if any

Dependent Medical & Care Information

Record the information another caregiver would need to safely continue day-to-day care.

Medical contacts

Primary doctor / clinic

Phone

Primary doctor / clinic address

Specialist / therapist

Phone

Specialist / therapist address

Pharmacy

Phone

Pharmacy address

Important medical conditions, allergies, or care needs

Medications or treatments

Medication / Treatment	Dose	When / How	Where It Is Kept

KEEP HEALTHCARE DOCUMENTS WITH THE RECORDS

This page is a practical summary. Keep prescriptions, treatment plans, consent forms, guardianship papers, and other official documents in the location you list elsewhere in this chapter.

Final Wishes Master Locator

Use this page as the quickest route to contracts, cemetery information, military records, donation arrangements, and other final-wishes documents.

FIND IT FAST

Document / Arrangement	Exact Location	Contact / Note

Things I still want to decide or arrange

Item	Next Step	Done
		☐
		☐
		☐
		☐

A Letter From Me

Use this page as a starting point. You do not need to answer every prompt.

To

Something I want you to always know

Something I admire, appreciate, or love about you

A memory of us that makes me smile

Something I hope for you

Anything else I want to say

Personal Letters & Memories Master Locator

Use this page to help your family find the letters, photos, recordings, recipes, stories, and keepsakes you want preserved.

FIND IT FAST

Letter / Memory / Item	Exact Location	Person / Note

INCLUDE DIGITAL LOCATIONS TOO

If something is stored on a phone, computer, cloud account, or other digital service, Chapter 6 should also point your family toward the access instructions.

Death Certificates & Official Copies

The funeral home or other provider can usually explain how certified copies are ordered where you live.

Certified copies

Number ordered

Date ordered

Ordered through

Contact / phone

Where certified copies are being kept

Where copies were sent or used

Organization / Purpose	Date Sent	Copy Type	Confirmation / Note

KEEP ORIGINALS ORGANIZED

Some organizations may need a certified copy; others may accept a photocopy or electronic image. Ask before sending an original or certified copy that may not be returned.

Call & Follow-Up Log

Write down names, dates, reference numbers, and what each person told you. It can save you from having to reconstruct conversations later.

Date	Company / Person	Who I Spoke With	Ref. / Claim No.	What They Said / Next Step

Waiting For & Expense Log

Keep track of items that are in process and money spent on behalf of the estate or household.

Waiting for

Item / Response	From Whom	Expected Date	Follow-Up / Note

Expenses paid

Date	Expense	Amount	Paid By / Receipt Location

SAVE RECEIPTS

Keep receipts and note who paid. An attorney, executor, personal representative, accountant, or other qualified professional can advise how expenses should be handled or reimbursed.

Annual Review Record

Use one line each time you review the planner.

Date	Reviewed With	Main Changes Made	Next Review

Change & Update Log

A quick record of important changes between annual reviews.

Date	Page / Topic	What Changed	Initials / Note

Pages I Need to Replace or Add

Use this list when a page fills up or information changes.

Chapter / Page	Form or Topic	Why I Need It	Done

USE THE RESOURCE CENTER

Selected extra printable forms are available at legacyresourcecenter.org so you can replace a filled page or add another copy without rewriting the entire planner.