EASY WHEN I'M GONE

The One-Page Sheet

If something happens to me, start here.

THIS SHEET BELONGS TO _____ FILLED IN ON _____

WHO HAS A COPY OF THIS PAGE _____

Step one: put every original in one place. One folder, one drawer, one safe. This page lives on top of it. The person in charge gets a copy.

THE ORIGINALS ARE HERE (which room, which drawer or safe, or which attorney holds them) _____

1 Call these people first *in this order*

The person I put in charge *executor or trustee*
NAME _____ PHONE _____

Our attorney *has the originals or knows where they are*
NAME _____ PHONE _____

Funeral home or faith leader
NAME _____ PHONE _____

Financial advisor or accountant
NAME _____ PHONE _____

Life insurance company *policy number below*
NAME _____ PHONE _____

First week tip
The funeral director files the death certificate. Ask them to order 10 certified copies. Banks and insurers want originals.

3 Getting in *phone, email, passwords*

The person who can unlock my phone
they know the code; it is not written here

Where my passwords and phone code are kept
the place, not the codes: an app, an envelope in the safe, a person

My main email address
it resets everything else

No passwords on this page. Copies of it go to several people. Write who can get in and where the codes are. Never the codes.

4 The house keeps running *bills that cannot miss*

MORTGAGE LENDER _____ LOAN NUMBER _____

PAID FROM A JOINT ACCOUNT?
☐ yes ☐ no ☐ not sure *joint keeps paying*

HOME INSURANCE COMPANY _____ POLICY NUMBER _____

PROPERTY TAX: COUNTY _____ DUE MONTH _____

5 Safe or safe deposit box *where the originals sit*

BANK OR LOCATION IN THE HOUSE _____

WHERE THE KEY OR CODE IS KEPT _____ WHO ELSE HAS ACCESS _____

2 The five documents *have it · where it is · who else knows*

The deed to the house

Decides who gets the house: the name on it, not the will.

HAVE IT? ☐ yes IF NOT IN THAT ONE PLACE, WHERE _____ WHO ELSE KNOWS _____

NAMES ON THE DEED _____ IS IT IN A TRUST? ☐ yes ☐ no ☐ not sure

Beneficiary forms

Decide who gets the money, even if the will says something else.

HAVE IT? ☐ yes IF NOT IN THAT ONE PLACE, WHERE _____ WHO ELSE KNOWS _____

ACCOUNT	INSTITUTION	LAST 4	BENEFICIARY NAMED?	
Bank accounts			☐ yes	☐ not sure
401k or IRA			☐ yes	☐ not sure
Life insurance			☐ yes	☐ not sure

More than one bank, retirement account or policy? List the rest on the back or on a second sheet.

Durable power of attorney

Lets someone pay the bills if I am alive but cannot. Signed while I still could.

HAVE IT? ☐ yes IF NOT IN THAT ONE PLACE, WHERE _____ WHO ELSE KNOWS _____

WHO I NAMED _____ DATE SIGNED _____

Health care directive

Says what I want and who speaks for me medically.

HAVE IT? ☐ yes IF NOT IN THAT ONE PLACE, WHERE _____ WHO ELSE KNOWS _____

WHO SPEAKS FOR ME _____ MY DOCTOR · name and phone _____

WHO CAN SEE MY MEDICAL RECORDS (the people named on my HIPAA release) _____

Will or living trust

Everything the first four do not cover.

HAVE IT? ☐ yes IF NOT IN THAT ONE PLACE, WHERE _____ WHO ELSE KNOWS _____

ATTORNEY WHO DREW IT UP _____ YEAR _____

Now: tell one person where this page lives. Redo it every January. An empty "have it" box is the one to fix first.

easywhenimgone.com

This sheet helps you organize your own information so your family can find it. It is not legal, tax or financial advice, it is not a will, trust, power of attorney or health care directive, and filling it in does not create or change any legal document. Rules differ by state. For your own situation, talk with a licensed estate planning attorney in your state. Easy When I'm Gone is an educational publisher, not a law firm, and does not sell legal documents.

© Easy When I'm Gone. Free to print and share with your family, as is.

Version 2 · Last updated November 10, 2026