PRINTABLE CHECKLIST

The Legacy Binder Checklist

Everything they'd need, gathered in one place — a little at a time.

◆ PRINT IT · CHECK IT OFF · BREATHE ◆

The emergency one-pager

If you only do one thing, do this page.

- [ ] **Who to call first.** Two or three people, with phone numbers.
- [ ] **Where the binder is.** And how to get into it.
- [ ] **Key professionals.** Attorney, financial advisor, accountant, insurance agent.
- [ ] **Dependents and pets.** Who is responsible, and any care instructions.
- [ ] **Medical basics.** Doctors, medications, allergies, where a healthcare directive is kept.

Key contacts

The people your family would need to reach.

- [ ] **Executor or the person you've chosen to handle things.**
- [ ] **Attorney, accountant, financial advisor.**
- [ ] **Employer and HR contact.** Benefits may need to be claimed.
- [ ] **Doctors.**
- [ ] **Close friends who should be told.** Families often don't know everyone.

NOTES

Where the documents are

Not the documents themselves — where each one lives.

- [ ] **Will and any trust documents.** Location, and who has copies.
- [ ] **Powers of attorney and healthcare directive.**
- [ ] **Birth and marriage certificates, passports, Social Security cards.**
- [ ] **Property deeds and vehicle titles.**
- [ ] **Tax returns for recent years.**
- [ ] **Safe or safe deposit box.** Where it is and who has access.

Accounts and passwords

Record where each password lives — never the password itself.

- [ ] **Bank and credit union accounts.** Institution and account type.
- [ ] **Retirement and investment accounts.**
- [ ] **Credit cards and loans.**
- [ ] **Utilities and recurring bills.** And which account pays them.
- [ ] **Email, phone and digital accounts.** Including photos and subscriptions.
- [ ] **Where passwords are stored.** A password manager, a sealed envelope.

NOTES

Insurance, assets and debts

A clear snapshot, not a full accounting.

- [ ] **Every policy.** Life, health, home, auto, disability, long-term care.
- [ ] **Employer benefits.** Group life insurance is often forgotten.
- [ ] **Property and valuables.**
- [ ] **Debts.** Mortgage, car loans, other balances.

Wishes and letters

The part only you can write.

- [ ] **Memorial or funeral wishes.** Burial or cremation, service preferences, anything prearranged.
- [ ] **Wishes for pets and sentimental items.**
- [ ] **Letters to the people you love.** Optional, and often the most treasured part.

NOTES

Keep it current

A binder is only useful if it's current.

- [ ] **Review it once a year.** Pick a date you'll remember.
- [ ] **Update after big life changes.** Marriage, divorce, a birth, a move, a new job.
- [ ] **Check beneficiaries.** They usually aren't changed by a will.
- [ ] **Tell someone where the binder is.** A binder no one can find doesn't help.

> **If you take one thing from this checklist:** tell someone the binder exists and where it is. A perfectly organized binder that no one knows about helps no one — a half-finished one that your family can find helps a great deal.

> **Please note:** This is a general organizing guide, not legal or financial advice. For wills, trusts, powers of attorney and healthcare directives, talk to a qualified attorney in your state.

NOTES

WHEN PAPER STOPS BEING ENOUGH

This checklist can't keep itself current.

Paper is a fine start. It gets harder to keep up to date, harder to keep private, and impossible to reprint the one-pager every time a phone number changes.

The MDRN Legacy Binder

An Emergency One-Pager that builds itself, a readiness score, a documents locator, accounts and insurance, and wishes and letters. Encrypted backups. Stays on your device.

mdrn-milestone-website.vercel.app/planners/legacy-binder.html

◆ $21, once. Yours forever. ◆