TOOL 1

If Something Happens to Me

A one-page starting point for the person who may need to help first.

QUESTION	YOUR ANSWER
My full legal name	
Date completed / updated	
The first person I want contacted	
Their phone / email	
My estate-planning attorney	
My financial advisor	
My CPA / tax professional	
My insurance professional	
My real estate broker / property contact	
My primary physician	
My trust / will is located	
My financial information is located	
My digital-access instructions are located	

QUESTION	YOUR ANSWER
My home / property records are located	
My health-care directive is located	

THREE THINGS I WANT MY FAMILY TO KNOW FIRST:

NOTES

If the situation involves the home, trust, probate, title, or uncertainty about what to do next, you can also begin with a trusted real estate professional who understands these transitions and can help coordinate the right next people.

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