

End-of-Life Planner

& In-Case-of-Emergency Organizer

Everything your loved ones will need, gathered calmly in one place.

THIS PLANNER BELONGS TO

Kept at:

A gift of clarity and love for the people you leave in charge.

TEMPLATETITANHQ

How to Use This Planner

Please read first — it takes two minutes.

This planner gathers the information, wishes, and document locations your family or executor will need. Fill in what you can now; you can always add more later. You do not have to complete it in order.

Keep it somewhere safe (a home safe, locked drawer, or with your attorney) and tell ONE trusted person where it is. Do NOT write full account passwords here — note only where your password manager or written list is kept.

This planner belongs to

Date started

Trusted person who knows where this is kept

Where this planner is stored

SECTION 01

Personal Information

Your core identity details in one place.

Full legal name

Also known as / maiden name

Date of birth

Place of birth

Home address

Phone

Email

Social Security number (store securely)

Driver's license / state ID no.

Passport number

Marital status / spouse or partner

Employer (or last employer)

Key People & Emergency Contacts

The people who should be called, and who is in charge.

Name	Relationship / role	Phone	Email

Roles to include: executor of your will, power of attorney, healthcare proxy, attorney, financial advisor, accountant, clergy, closest family.

Medical Information & Advance Directives

For caregivers, hospitals, and your healthcare proxy.

Primary physician (name / phone)

Preferred hospital

Blood type

Allergies

Chronic conditions

Current medications & doses

Health insurance / Medicare ID

Do you have an Advance Directive / Living Will? Where is it kept?

Healthcare proxy / medical POA (name / phone)

DNR order? Location

Organ donor? Wishes

Insurance Policies

Every policy your family may need to claim or cancel.

Policy type	Company	Policy number	Contact / phone

List the company and policy number — the actual documents can stay in your files; note their location in the Document Locations section.

Financial Accounts

Banks, retirement, and investments — the money map.

Institution	Account type	Account number (last 4)	Notes / beneficiary

Safe deposit box (bank / box no. / where is the key?)

Income, Bills & Subscriptions

What comes in, what goes out, what to cancel.

Payee / source	Amount	Auto-pay from	Cancel or keep?

Include pensions, Social Security, recurring bills, memberships, and streaming/subscriptions to cancel.

Property & Physical Assets

Home, vehicles, and valuables.

Asset	Details / VIN / location	Owned outright or owed?	Intended for

Digital Accounts & Devices

The online life that must be closed or preserved.

Where is your password manager or written password list kept? (do NOT write passwords here)

Phone / computer unlock — where is the code kept?

Account	Username / handle	Action (close / keep / transfer)

Legal Documents & Their Locations

Not the documents themselves — where to find them.

Document	Location	Attorney / contact

Final Wishes — Service & Ceremony

So your family can honor you without guessing.

Burial, cremation, or other

If pre-arranged: provider / plan / location of paperwork

Type of service (funeral, memorial, celebration of life, none)

Where would you like the service held?

Faith / officiant preferences

Music, readings, or scripture you would like

Flowers, or donations to (charity)

Who should be notified / invited

SECTION 11

Final Wishes — Resting Place & Obituary

The remaining details, in your own words.

Cemetery / plot / or where ashes should go

Do you own a plot? Location of deed

Headstone or marker wishes

Obituary — what matters most to say about your life

People, places, and accomplishments to mention

Pets

The ones who will need someone.

Pet name & type	Vet (name / phone)	Who should care for them	Food / meds / routine

Messages to Loved Ones

Space for the words that matter most.

To

Message

Executor's First-Steps Checklist

For the person handling things — what to do first.

Suggested order for the first days and weeks. Check each as it is done. Consult an attorney for legal steps.

- ☐ Obtain the legal pronouncement of death and 10-15 certified death certificate copies
- ☐ Contact close family, key people, and the employer
- ☐ Locate the will, trust, and this planner
- ☐ Notify the funeral home / carry out final wishes above
- ☐ Contact the attorney and executor named in the will
- ☐ Notify Social Security (1-800-772-1213) and any pension providers
- ☐ Contact life insurance companies to begin claims
- ☐ Secure the home, vehicles, and valuables; forward mail
- ☐ Notify banks, then a credit bureau to flag the file against fraud
- ☐ Cancel subscriptions, memberships, and recurring payments
- ☐ Close or memorialize digital and social accounts
- ☐ Keep a running log of every account, call, and claim

Document Location Index

One glance to find anything in this planner.

Item / document	Where it is kept	Who else has a copy

Terms & Disclaimer

Please read.

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