

*Share this document with those you trust and/or the executor of your estate.***Legal Documents (e.g. will, etc.)**

All legal documents (will, power of attorney, etc.) can be found _____ . If there is a lock present, the key can be located _____ .

If you are unable to get the keys or to the location of the documents, contact the attorney, _____ at _____ .

Contact the Following Individuals (People who need to know as soon as possible)

Name	Relationship	Telephone	Name	Relationship	Telephone
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Insurance Policy Location (list all insurance policies including, life, medical, dental, mortgage, rent, long-term care, umbrella, etc.)

All insurance policies are located _____ .

Company Name	Contact Name	Phone	Insured	Type of Ins.	Benefit (if any)	Policy Number	Anniversary	Billing Cycle	Payment Method
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
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_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____

Bank Accounts

Account Name	Account #	Bank Name	Bank Officer	Phone	Account Name	Account #	Bank Name	Bank Officer	Phone
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____

Investment Accounts

Account Name	Account Type	Account #	Custodian	Contact Person	Contact Company	Contact Phone

Passwords

Passwords for a variety of applications can be found _____. The passcode for the phone of _____ is _____.

_____ The passcode for the phone of _____ is _____.

Telephone Emergency Contact

iPhone

"A Medical ID provides information about you that may be important in an emergency, like allergies, medical conditions, and your emergency contacts. Your iPhone and Apple Watch can display this information so that it's available for someone attending to you in an emergency and your emergency contacts can be notified if you use Emergency SOS via satellite." (<https://support.apple.com/guide/iphone/set-up-and-view-your-medical-id-iph08022b192/ios>)

Create Your Medical ID

- Set up a Medical ID in the Health app.
- Open the Health app on your iPhone.
- Tap your picture at the top right, then tap Medical ID.
- Tap Get Started or Edit, then enter your information.
- Below Emergency Contacts, tap Add Emergency Contact, then add your contacts.
(After an emergency ends, your iPhone alerts your emergency contacts with a text message, unless you choose to cancel. Your iPhone sends your current location (if available) and - for a period of time after you enter SOS mode - your emergency contacts receive updates when your
- Tap Done.

Android

"If you're in an emergency situation, you can use your phone to start emergency actions like calling for help, sharing your location with your emergency contacts, and recording video." (<https://support.google.com/android/answers>)

Add Emergency Info to Personal Safety app

- On your phone, open the Safety app.
- Sign in to your Google Account.
- Tap Your Info.
- Add your emergency information.
- For Medical, Tap Medical Information
- For Emergency Contacts, tap Emergency Contacts

Facebook Legacy Contacts

Facebook offers Legacy Contacts that will allow specified individuals to be able to create final posts, update your profile picture and cover photo, request to remove the account, and download what you've shared on Facebook (if the feature is turned on). A legacy contact cannot log into your account, read your messages, nor remove any friends or add friends. A Legacy Contact has to be 18 years of age or older. (<https://www.facebook.com/help/15680139900808948>)

Legacy Contact Creation or Update

- From your main profile, tap in the top right of Facebook.
- Scroll down and tap Settings & Privacy, then tap Settings.
- Below Account, tap Access and control.
- Tap Choose Legacy Contact and follow the on-screen instructions.

