



LIFE ESTATE ORGANIZER



# LIFE ESTATE ORGANIZER CHECKLIST



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Organizing all your life and estate details can be daunting. You've accumulated a lifetime of information which makes it hard to know where to begin. Life Estate Organizer checklist can help. LEO identifies many of the documents, accounts, and items you should start thinking about and gathering to assist your loved ones in settling your estate.

This checklist is also a great starting point for LEO - our easy-to-use digital planning tool. LEO is a safe and secure "digital lockbox" used to organize and store all of these documents and details; everything from your Last Will & Testament to financial records, life insurance, passwords, and more - stored in one place, simple to access and update at any time.

**Start with the checklist and give LEO a try any time with our free 14-day trial.**

Personal Information	
	Physical characteristics
	Social security number
	Driver's license
	Birth certificate
	Parents contact information
	Family information
	Religion
	Employment history
	Citizenship

Education	
	School types
	Educational institution
	Graduation year(s)
	Accomplishments

Marital status	
	Marital status
	Marriage license
	Prenuptial agreement
	Marriage information

Military	
	Branch
	Rank
	Duty
	Service number
	Service Dates
	Awards and Medals
	Duty assignments
	Lessons learned

Associations	
	Name of Association
	Membership information
	Location of reports
	Contact information
	Online URL
	User ID and Password
	Location of Card
	Location of agreement

Medical	
	Blood type
	Medications taken
	Joint replacements
	Conditions
	Illnesses
	Allergies
	Social history
	Emergency contact

Autobiographical	
	Likes
	Dislikes
	Memories
	Personal qualities



# LIFE ESTATE ORGANIZER

## Pending Commitments

Commitment description
Commitment to whom
Start date
Commitment notes
Location of work in progress
Value of work to be performed

## Pending lawsuit

Lawsuit description
Legal counsel
Location of lawsuit information

## Family

Family members identified
Family member personal information
Family member physical characteristics
Contact information
Life status
Birth information
Medical information
Special needs
Education
Guardians
Important dates

## Pets

Name
Description
Birthdate
Birth place
License
Chip information
Documentation
Life status
Medical history
Special care instructions
Pet's activities
Pet's food
Pet's guardian
Pet's veterinarian
Pet attendees
End of life instructions

## Estate Documents

Last Will and Testament.
Trust.
Health Care Directives.
Financial Power of Attorney.
Protect your Children's Property.
Beneficiary Forms.
Life Insurance.
Estate tax.
Funeral expenses and arrangements.
Protecting your business.
Location of Documents.

## Estate Settlement

Identify trusted individuals
Organize and upload Estate Documents
Identify nursing home preferences
End of life service type
Funeral decision makers
Funeral or memorial events
Funeral arrangements
Obituary
Executor letters
Personal letters to loved ones and trusted individuals
Thoughts about your life

## Insurances

Insured's name
Insurance type
Insurance Company/Agency contact information
Insurance Company/Agency URL
Policy description
Issue/expiration date
Location of policy
User ID and password
Member/Group ID number



# LIFE ESTATE ORGANIZER

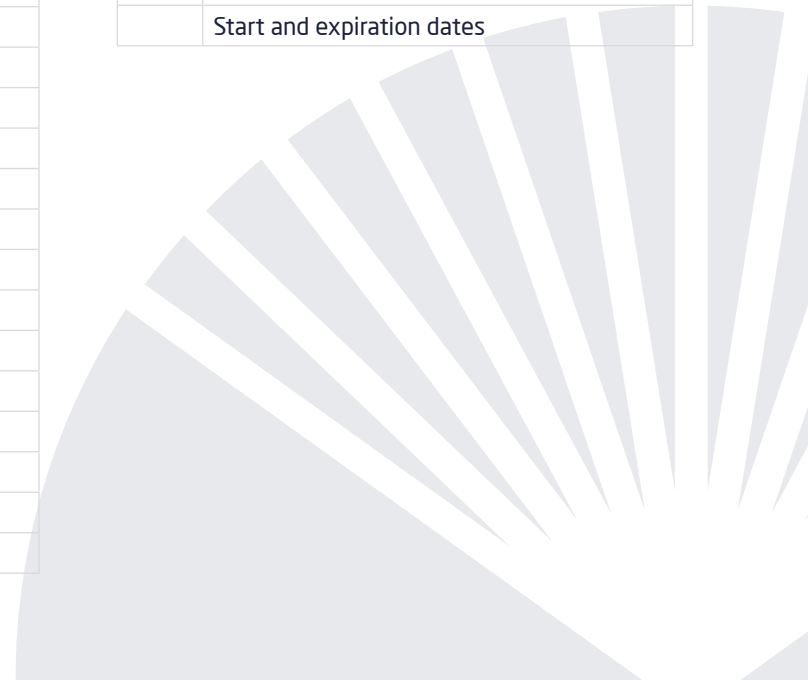
Property	
	Identify Digital Equipment
	Identify Digital services
	Identify Social Media providers
	Identify Internet providers
	Identify Intellectual property
	Identify personal property and keepsakes
	PINS and Passwords
	Safe location and entry information, contents
	Software
	Residencies
	Vehicles
	Weapons
	Other Property

Creditors	
	Identify Credit Cards, location, statements
	Identify residence maintenance Companies
	Identify residence expenses
	Extended warranties
	Loans - personal/mortgage/other
	Residence rented or leased information
	Prescriptions
	Subscriptions
	Telephone
	Vehicle leases
	Other creditors
	Other liabilities

Financial	
	Checking accounts
	Savings accounts
	Cash locations
	Financial service accounts
	Collectible debts
	Personal loans
	Tax return information and locations
	Land contracts
	Online banking information
	Sources of income
	Donations, Charities
	Estate Wealth Plan
	Net Worth Statement
	Other Financial Information

Investments	
	Annuities
	Certificates of Deposit
	Money Market
	Commercial Property
	Brokerage Firms
	Individual Retirement Accounts (IRA)
	Personally Traded Equities
	Personally Traded Bonds
	Personally Traded Investments
	Pension Funds
	SEP/SARSEP Funds
	Privately Held Business interests
	Profit Sharing Plans
	Stock Bonus Plans
	Other Investment Information


Checklist Item	
	Company's URL
	Contact
	Contact information
	Location of Documents
	Password for Online Services
	Entry information to safes, safety deposit, residences and commercial property
	Location of statements/reports for creditors, financial and investment accounts
	Employee Identification numbers
	Member and Group ID numbers
	Deeds for property(ies)
	Location of agreements
	Payment information - how, when, where, to whom, amount
	Direct deposit information
	Historical documents - stocks, bonds, commodities, etc.
	Account numbers
	Start and expiration dates







## LIFE ESTATE ORGANIZER

LEO is easy to use and each section has a help  feature to guide you through how to prepare and complete it. By teaming up with LEO, you will create a professional, legal document that will assist your loved ones and trusted individuals and provide Peace of Mind to you.

**So, visit our website and GET STARTED!!**

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