

Leave a Map, Not a Mess



When people die, it can be challenging for their heirs to locate all their financial assets. Instead of leaving behind a mess, SPW clients can leave a map! Use this worksheet to help those who may eventually be involved settling your affairs.

This is not a legal document or a substitute for professional legal advice—an estate plan created by a qualified attorney with regular updates is essential. We recommend updating it each year and keeping it in a secure location, such as your electronic vault on your website, along with a list of complete recent statements for your various accounts. Instruct your trusted contacts to reach out to us in the event of your incapacitation or death.

Learn how to upload files to your electronic vault with SPW [here](#). Date Completed: _____

Important Documents: consider keeping copies of the following with this form

- Location of Tax Returns: _____
- Location of Original Birth Certificate: _____
- Location of Original Marriage License: _____
- Location of Estate Plan (Trust, Will, etc.): _____
- Location of Military Records: _____
- Location of Social Security Card: _____
- Location of Judgments from Court Cases: _____
- Location of Medical Records: _____
- Location of Titles to Home/Real Estate/Vehicles: _____
- Location of Mortgage or Loan Statements: _____
- Location of Utility Statements: _____
- Location of Other Important Documents: _____

Personal Property

- Location of Safe Deposit Box or Personal Safe: _____
- Location of Key(s): _____
- Location of Someone Else's Property in My Possession:
 - Property Identifiable as: _____
 - Location: _____

Pet and Home Care Instructions

- Pet Information and Care Instructions: _____
- Home Care Instructions: _____



Digital Assets

- Apps with Value (Venmo, PayPal, etc.):
 - Rewards Points (credit cards, airline miles, etc.):
 - Social Media (usernames, password locations):
 - Email (email addresses, password locations):
 - Devices (location, important files, password locations):
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Important Contact Information: List Names, Relationships, Phone Numbers, Email Addresses, Address and Any Special Instructions

Successor Trustee(s):

Guardian(s):

Personal Representative(s):

Financial Advisors:

Attorney(s):

Doctor(s):

Tax Advisor(s):

Insurance Agent(s):

Spiritual Advisor(s):

Ethical Will: An Ethical Will is a non-legal document that supplements an estate plan. It's a way to put your financial/life lessons, values, and wishes on paper for your heirs. This can offer a window into your thinking and help resolve family conflicts and inform beneficiaries of your wishes for use of funds, etc. Ethical Wills take on many forms. A quick "Google" search will yield many examples. Use the space below to write your Ethical Will.
