



What Are You Forgetting?

An Estate Planning Worksheet — The Little Things That Make a Big Difference

October | Estate Planning Awareness Month

Your estate planning documents are important, but what about all the little details that someone else may need to know?

This worksheet is designed to help you organize the everyday information that is often overlooked. Complete what applies to you, leave blank what doesn't, and keep it with your estate planning records.

Name: _____

Date Completed: _____

Last Updated: _____

1. Banking & Financial Information

☐ Safe Deposit Box

Bank / Financial Institution: _____

Branch / Location: _____

Box Number: _____

Location of Key: _____

☐ Banks, Credit Unions & Investment Accounts

List the financial institutions where you maintain accounts.

Financial Institution	Type of Account

☐ **Electronic Statements**

Which accounts receive statements electronically rather than by mail?

☐ **Life Insurance & Retirement Accounts**

Company / Institution: _____

Type of Policy / Account: _____

Location of Information: _____

Company / Institution: _____

Type of Policy / Account: _____

Location of Information: _____

☐ **Rewards, Airline Miles & Loyalty Programs**

Program / Company: _____

Account Information Location: _____

Program / Company: _____

Account Information Location: _____

☐ **Tax Records**

Location of Recent Tax Returns: _____

Location of Electronic Tax Records: _____

Tax Preparer: _____

2. Bills & Automatic Payments

☐ **Monthly Bills & Household Expenses**

List regular bills and how they are paid.

Bill / Expense	Company	Automatic / Manual
Mortgage / Rent		
Electricity		
Telephone / Internet		

Heating / Fuel		
Water / Sewer		
Other		

☐ **Automatic Withdrawals & Subscriptions**

Include streaming services, memberships, charitable donations, and other recurring charges.

Company / Service	Payment Source	Frequency

☐ **Credit Cards & Outstanding Loans**

Financial Institution: _____

Type of Debt: _____

Payment Information Location: _____

Financial Institution: _____

Type of Debt: _____

Payment Information Location: _____

☐ **Insurance Policies & Renewals**

Insurance Company: _____

Type of Coverage: _____

Policy Information Location: _____

Renewal Date: _____

Additional Insurance Information: _____

3. Home, Camp & Other Property

☐ Real Estate & Property Records

Property Address / Location: _____

Location of Deed: _____

Property Tax Information: _____

How Is the Property Owned: _____

☐ Additional Property / Maine Camp

Property Location: _____

How Is the Property Owned: _____

Location of Deed / Records: _____

Property Tax Information: _____

☐ Property Insurance

Insurance Company: _____

Agent / Contact: _____

Telephone: _____

Location of Policy: _____

☐ Keys, Access & Security

Location of House Keys: _____

Location of Camp / Other Property Keys: _____

Home Safe Location: _____

Where Are Secure Access Instructions Kept: _____

☐ Utilities & Seasonal Maintenance

Electric Company: _____

Heating / Fuel Company: _____

Snow Removal / Lawn Care: _____

Camp Opening / Closing Contact: _____

Other Maintenance Contacts: _____

☐ **Storage Units & Other Storage Locations**

Storage Facility / Location: _____

Unit Number: _____

Where Are Access Instructions Kept: _____

Contents / General Description: _____

☐ **Vehicles, Boats & Recreational Equipment**

List vehicles, boats, trailers, recreational vehicles, or other titled property.

Property / Item	Location	Title / Records Location

☐ **Camp & Seasonal Equipment**

Where are boats, docks, equipment, or other seasonal items stored during the winter? _____

Who knows how to open, close, or maintain the camp? _____

Name: _____

Telephone: _____

Special Instructions: _____

4. Personal Belongings & Family Keepsakes

☐ Jewelry, Antiques & Valuable Collections

Description of Item / Collection: _____

Location: _____

Appraisal / Insurance Information Location: _____

☐ Family Photographs & Keepsakes

Where are family photographs, albums, letters, and other meaningful belongings kept: _____

Are any photographs or family videos stored digitally? ☐ Yes ☐ No _____

Location / Storage Service: _____

☐ Tools, Equipment & Other Valuable Personal Property

Description: _____

Location: _____

Description: _____

Location: _____

☐ Personal Property Memorandum

Have you prepared a separate written list identifying who should receive certain personal belongings? ☐ Yes ☐ No _____

Location of Memorandum: _____

Date Last Updated: _____

☐ Special Family Heirlooms

Are there items with sentimental or family significance that someone should know about? _____

5. Digital Information & Online Accounts

☐ Primary Email Accounts

Email Address: _____

Email Address: _____

☐ Passwords & Account Access

Do you use a password manager? ☐ Yes ☐ No _____

Name of Password Manager: _____

Where Are Secure Access Instructions Stored: _____

☐ Online Banking & Investment Accounts

List accounts managed entirely online: _____

☐ Online Shopping Accounts

List frequently used online shopping accounts or accounts with stored balances or credits: _____

☐ Cloud Storage & Digital Photographs

Do you store important documents, photographs, or family videos online? ☐ Yes ☐ No _____

Storage Service / Provider: _____

Location of Access Instructions: _____

☐ Medical Portals & Electronic Health Information

Healthcare Provider / Portal: _____

Healthcare Provider / Portal: _____

Location of Access Instructions: _____

☐ **Paperless Accounts & Digital Records**

Are there important accounts, bills, or records that someone would not discover by reviewing your mail? _____

6. Important Contacts & Personal Instructions

☐ **Professional Contacts**

Attorney: _____

Telephone: _____

Accountant / Tax Preparer: _____

Telephone: _____

Financial Advisor: _____

Telephone: _____

Insurance Agent: _____

Telephone: _____

Other Important Contact: _____

Telephone: _____

☐ **Original Estate Planning Documents**

Location of Original Will: _____

Location of Trust Documents: _____

Location of Financial Power of Attorney: _____

Location of Healthcare Directives: _____

Other Important Documents: _____

☐ **Funeral & Burial Arrangements**

Have arrangements been made? ☐ Yes ☐ No _____

Funeral Home: _____

Contact Information: _____

Location of Written Instructions: _____

Have arrangements been prepaid? ☐ Yes ☐ No _____

Additional Wishes / Information: _____

☐ **Pets & Special Responsibilities**

Pet Name(s): _____

Veterinarian: _____

Person to Contact for Pet Care: _____

Telephone: _____

Special Instructions: _____

☐ **Recurring Charitable Contributions**

Organization: _____

Contact / Payment Information: _____

Organization: _____

Contact / Payment Information: _____

7. Things Only You Know

Sometimes the most important information is not found in a legal document, bank statement, or filing cabinet. It's the information that only you know.

☐ **Is there an account, valuable possession, property, or responsibility that no one else knows about?**

☐ Are there important family photographs, heirlooms, or personal belongings you want someone to know about?

☐ Is there someone who relies on you for assistance, financial support, or other responsibilities?

☐ Are there special instructions about your home, camp, pets, or other property that someone should know?

☐ What is the first thing someone would have difficulty finding or understanding if you could not explain it?

☐ Is there anything else you would want your family or trusted decision-maker to know?

8. One Last Check

If someone needed to step in tomorrow, would they know where to begin?

- ☐ I have completed the sections that apply to me.
- ☐ I have reviewed my information for accuracy.
- ☐ I have identified where important original documents are kept.

- ☐ I have included information about accounts that do not generate paper statements.
- ☐ I have identified important contacts and ongoing responsibilities.
- ☐ I have identified where secure digital access instructions are stored.
- ☐ I have placed this worksheet with my estate planning records.
- ☐ I have told a trusted person where to locate this information.

☐ **Who knows where this worksheet and your important records are kept?**

Name: _____

Relationship: _____

Telephone: _____

Location of Completed Worksheet: _____

Date to Review Again: _____

A Few Important Reminders

This worksheet is intended to supplement your estate planning documents, not replace them.

Keep it secure. Do not include passwords, PINs, account login credentials, or safe combinations directly on this worksheet. Instead, identify where that information is securely maintained.

Keep it current. Review the worksheet periodically and whenever you open or close accounts, purchase or sell property, or experience significant life changes.

Make it accessible. Let an appropriate trusted person know where the worksheet is kept, while protecting sensitive personal and financial information.

Review your legal documents separately. This worksheet does not change your Will, Trust, beneficiary designations, or other legal documents. Any desired legal changes should be addressed through the appropriate process.

Legal Disclaimer: This checklist is provided for general informational purposes only and is not legal advice. Using it does not create an attorney-client relationship. It is not a legal document or a substitute for advice from qualified legal counsel.

Individuals seeking legally binding estate planning or incapacity planning documents should consult a licensed estate planning or elder law attorney in the State of Maine.