

A wooden pier made of dark planks extends from the bottom left towards the center of the image, receding into the distance. The pier is set against a background of a calm body of water and a sunset sky with warm orange and yellow hues near the horizon, transitioning to a darker blue at the top. The overall mood is peaceful and contemplative.

My “If I Go Too Soon” File

# Essential Info Your Loved Ones Will Need

Death is not an ending—  
it's a transition. This  
guide will help you  
transform grief into  
grace, paperwork into  
peace of mind, and  
logistics into lasting love.

Personal Contact & Info

Financial & Legal

Digital Life

Final Wishes

Letters & Legacy

# Intro

Unexpected loss is already heartbreaking enough—don't leave your loved ones lost in paperwork, guessing your wishes or scrambling for important details. This carefully prepared file is more than just documents; it's your final and most enduring act of love and protection.



*Life deserves a meaningful farewell—this guide helps you organize the practical so you can focus on the profound.*

# — Personal & Contact Info

### The Foundation: Start With the Essentials

When the unimaginable happens, confusion compounds grief. **This section ensures your loved ones aren't left scrambling** for basic details during an already overwhelming time. By documenting key personal information and contacts, you create **a roadmap through the bureaucracy of loss**. Think of it as leaving breadcrumbs of clarity in the forest of paperwork. These details may feel mundane, but they're **the first act of care you can provide**.

### What to Document Now

- **Your Vital Statistics:** Include full legal name, birthdate, and Social Security Number. **Store securely**—this page should be kept separately from account passwords.
- **Medical Must-Knows:** List allergies, chronic conditions, and current medications. **Note your preferred doctors** to ensure continuity of care records.
- **Inner Circle Contacts:** Provide phone/email for immediate family, executor, and clergy. **Flag who should be notified first** in an emergency.
- **Professional Team:** Attorneys, financial advisors, and insurance agents. **Include account numbers or case references** to expedite processes

### Keeping It Safe Yet Accessible

**Balance security with practicality:** Store originals in a fireproof lockbox, but give your executor a sealed copy. **Bold the most critical items** (like SSN or primary doctor) for quick reference. Remember, **this isn't just data—it's the keys to honoring your life with dignity**.

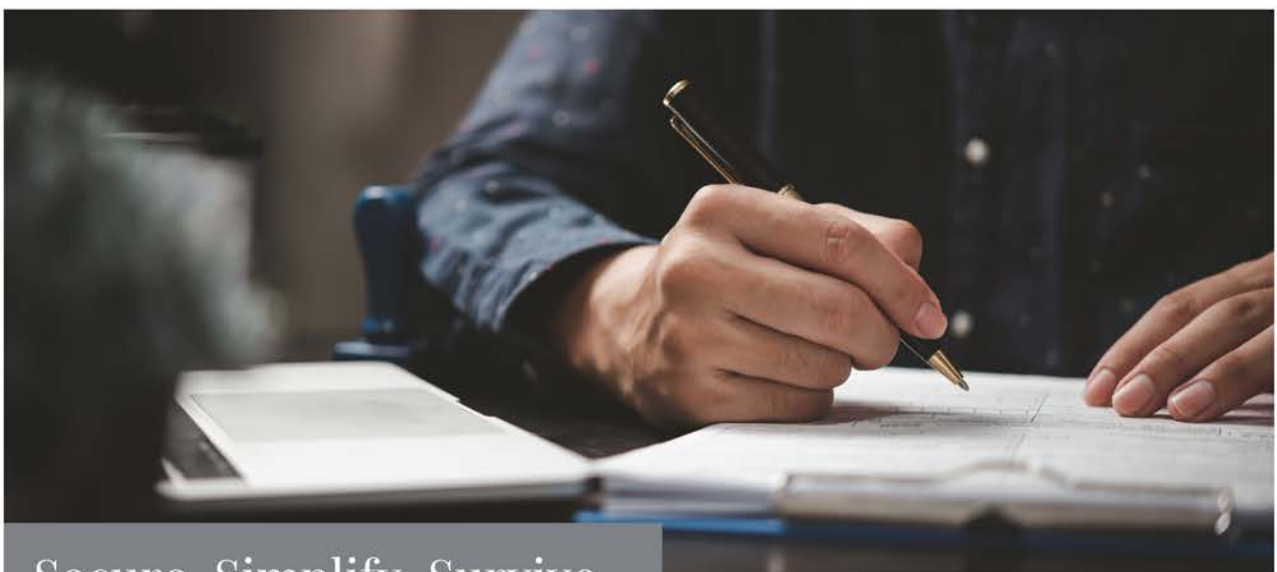
# My “If I Go Too Soon” File

## Financial & Legal

### Untangling the Web: Financial Clarity in Crisis

Death doesn't erase debts or simplify paperwork—it magnifies them. This section ensures your people can navigate accounts and obligations **without added stress.**

- **Bank Accounts Unlocked:** List every checking/savings account with institution names and last four digits. **Never write full passwords here —use a secure vault reference instead.**
- **Investment Roadmap:** Document retirement funds, stocks, and bonds by institution. **Flag any accounts with automatic distributions or penalties.**
- **Debts That Don't Disappear:** Credit cards, mortgages, personal loans (include account numbers). **Note which debts are jointly held or insured.**
- **Legal Documents Locator:** Wills, trusts, and powers of attorney with physical locations. **Specify if digital copies exist in shared drives.**
- **Insurance Safety Net:** Policy numbers for life/health/property coverage. **Highlight any premiums due post-death to avoid lapses.**



Secure. Simplify. Survive.



# My Vital Info Mastersheet

## Personal Details

Name	
DOB	
SNN	

Medical Info	Financial Accounts (Bank, Investments, Debts, Insurance)
Key Contacts (Family, Lawyer, Doctor)	

# Digital Life

In our connected world, your online presence outlives you—from cherished photos to forgotten subscriptions. **This section ensures your digital identity is managed with intention**, not left to algorithms or guesswork. Over 30% of grieving families struggle to access loved ones' accounts, wasting precious emotional energy on password resets. By organizing your digital life now, you transform what could be a bureaucratic nightmare into **a curated extension of your memory**. These aren't just logins; they're chapters of your story.

- **Essential Account Inventory:** List email, social media, and cloud storage with recovery options. **Flag accounts you want memorialized versus deleted.**
- **Password Security Protocol:** Use a trusted password manager (like Bitwarden or 1Password). **Never include master passwords here—only instructions for access.**
- **Digital Assets & Valuables:** Document cryptocurrency wallets, blogs, or creative work. **Specify ownership transfers for monetized content.**
- **Device Access Guide:** Provide phone/computer PINs and backup locations. **Note any auto-delete features (like Signal messages).**



# My “If I Go Too Soon” File

## Final Wishes

- **Ceremony Specifics:** Specify burial/cremation, location, and any eco-requests (e.g., biodegradable urn). **Note if you’ve prepaid for services or plots.**
- **Memorial Vibes:** Describe your ideal gathering: "Backyard BBQ with string lights" or "Quiet beach sunset." **Include must-play songs or no-go tunes.**
- **Body & Organ Donation:** State your wishes clearly (full donation, specific organs, or none). **Provide registration numbers if applicable.**
- **Sentimental Distributions:** List who receives cherished items (Grandma’s recipe book, vinyl collection). **Add why it matters to them.**
- **Unconventional Requests:** Plant a tree with your ashes? Turn your tattoo into art? **No judgment here—just clarity.**



### Tip

Assume nothing—write down even “obvious” wishes; grief makes the familiar feel impossible.

# MY FINAL WISHES & LEGACY

## Funeral/Memorial Preferences

- ☐ Music: \_\_\_\_\_
- ☐ Dress code: \_\_\_\_\_
- ☐ Readings: \_\_\_\_\_

## Pet/Belongings Instructions

- ☐ “Fluffy goes to [Name], [Phone]”
- ☐ “The house goes to [Name], [Phone]”
- ☐ “Donate my clothes to [Organization’s Name], [Phone]”

## “Letters to Loved Ones” Prompts

- “If you’re reading this, I wish I could hug you right now. So here’s what I’d say if I were there: \_\_\_\_\_”
- “What I want you to remember when you’re sad: \_\_\_\_\_”
- “Our funniest memory together: \_\_\_\_\_”

### Letters & Legacy



Love. Legacy. Linger.

While legal documents handle the logistics, **letters and legacy gifts carry your voice beyond the grave.** This is where you transform memories into lasting comfort, offering loved ones not just answers, but connection. A 2022 study found that 89% of bereaved people cherish handwritten notes more than material inheritances. **These words become lifelines**—read on birthdays, reread in grief waves, passed to future generations. Here’s how to leave traces of your spirit, not just your signature.

- **Legacy Letters:** Write individual notes to key people (seal and label them). **Share memories only they would cherish, like inside jokes or private moments.**
- **Ethical Will:** Document life lessons, values, and hopes for your family’s future. **Keep it conversational—record a voice memo if writing feels stiff.**
- **Time Capsule Items:** Curate photos, playlists, or small mementos with explanatory notes. **Example: ‘This ticket stub was from our first date—I kept it for 20 years.’**
- **Gratitude & Apologies:** Acknowledge unresolved relationships or express overdue thanks. **These often bring the most healing to those left behind.**

## My “If I Go Too Soon” File

### Maintenance & Next Steps



This file only helps if it grows with you. Treat it like a living document, not a time capsule.

- **Annual Check-Ins:** Review every birthday or tax season. **Update account numbers, new contacts, or changed wishes.**
- **Share the Updates:** Notify your executor of any changes. **Store revisions with the same security as the original.**
- **Practice Access:** Ensure trusted contacts know where to find and how to open the file. **Test-drive instructions while you're here to guide them.**

**This isn't about mortality—it's about love in its most practical form.** By maintaining this file, you gift your people clarity amidst chaos. **The best legacy isn't just what you leave behind, but how easily they can find it.** Now take a deep breath—you've done the hardest part.

*Inquire about any available grief support resources or aftercare services.*

Don't hesitate to ask any questions you may have throughout the process.

Tip

Remember: This isn't about preparing for death—it's about celebrating life by lifting burdens from those you love.



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Provided by:



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