FREE SAMPLE PAGE FROM

The Family Affairs Organizer

Every account, every policy, every password, every wish, and where to find all of it. One place, in your own handwriting, so your family never has to guess.

Inside this sample
The one-page "first week" checklist for your family

The full organizer
38 pages, 10 sections, $27

Get it at
familyaffairsorganizer.com

FOR MY FAMILY

The first week

If you are reading this because something has happened to me: I'm sorry, and I love you. This page is so you don't have to figure out the order of things while you're grieving. Take it one line at a time.

The first day or two

- [ ] Call the people on the next page, in that order. Let them help.
- [ ] If I died at home and it was expected, call hospice or my doctor. If unexpected, call 911.
- [ ] Call the funeral home in Section 8. They will come when you are ready, not before.
- [ ] Find my ID, and my wishes (Section 8). Don't decide anything the funeral home asks about until you've read that page.
- [ ] If I have pets or anyone depends on me, Section 1 says who should take them.

The first week

- [ ] Ask the funeral home for 10 to 15 certified copies of the death certificate. Every bank, insurer, and agency wants an original.
- [ ] Call my employer or pension (Section 3) and Social Security (1-800-772-1213).
- [ ] Call each life insurance company in Section 4 and start the claims. Have the policy numbers in front of you.
- [ ] Don't pay my bills from your own money, and don't rush to close accounts. Talk to the attorney in Section 1 first.
- [ ] Forward my mail. It will tell you about accounts I forgot to write down.
- [ ] Keep a notebook of every call: who, when, what they said, a reference number.

In the first month

- [ ] Meet with the attorney about the will or trust (Section 2 says where it is).
- [ ] Notify banks, credit cards, utilities, subscriptions (Section 3). Cancel what should stop.
- [ ] Go through Section 7 for my phone, email, and online accounts. Download the photos first.
- [ ] Read Section 9. Those pages are for you.