Your Quick-Start Checklist

Everything the book asks you to do, on one page. Check the boxes in any order — each one is a finished gift to your family.

The first hour (Chapter 2 — do this today)

- ☐ List every account: bank, credit union, retirement, investment (institution + last 4 digits only)
- ☐ List every insurance policy that exists, with the company name
- ☐ Write down your key people: attorney, CPA, financial advisor, insurance agent, HR contact
- ☐ Write down where your documents physically live (will, deed, titles, tax returns)
- ☐ Write five sentences of emergency instructions to your family
- ☐ Tell one trusted person where this worksheet lives

The legal cornerstones (Chapters 3–6)

- ☐ Sign a will — and actually complete the witnessing; 99 percent done is legally zero
- ☐ Decide whether a living trust fits your situation (Chapter 4's decision tree)
- ☐ Put the four essential documents in place: financial POA, healthcare proxy, living will, HIPAA release
- ☐ Run the Beneficiary Audit on every account and policy — beneficiary forms override your will

Your money & property (Chapters 7–9)

- ☐ Complete the Master Asset Inventory: what you own, what you owe, where the paperwork lives
- ☐ Fill in the Insurance & Benefits Register, including Social Security and VA notes for your family
- ☐ Add POD/TOD designations where they fit — they skip probate for free
- ☐ Move your original will OUT of the safe deposit box

The modern & the personal (Chapters 10–12)

- ☐ Set up Apple Legacy Contact, Google Inactive Account Manager, and your Facebook memorial choice
- ☐ Build the Digital Asset Inventory — locations and usernames, never passwords
- ☐ Seal your master password in an envelope; record only its location in your papers
- ☐ Fill in your Final Wishes Summary and sign it
- ☐ Have The Conversation: tell your family what exists and where the organizer lives
- ☐ Write your "Letter to My Family" and put it in the front of the organizer

Making it real (Chapters 13–14)

- ☐ Choose your path: DIY, online service, or attorney — and book the appointment

☐ Put your yearly Estate Check-up Day in the calendar as a repeating event