

EMERGENCY INSTRUCTIONS AND FINAL INSTRUCTIONS

[Show here *where*, on your laptop or computer, or in your file cabinet, your representative will find this document, e.g., Finder/Desktop/My Folder/final.matters/final.plans.docs/emergency and final instructions]

[Insert date or revision date here]

This is not a FINAL WILL. It is a template that helps you to spells out details for whoever will handle your end-of-life affairs. Please delete or add elements to meet your own needs. In this template, details concerning a business have been included.

If this process seems complex, imagine the complexity for the person who would otherwise have to “read your mind” once you are gone.

This packet contains instructions for my **Personal Representative**, [Name], [Address] [Phone number]; or in the event [Name] is unable, my **Alternate Personal Representative**, [Name], [Address] [Phone number], to be carried out upon my death, or upon loss of capacities to carry out my personal [optional: and business] affairs.

My **Health Care Representative** is [Name], [Address] [Phone number].

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EMERGENCY INSTRUCTIONS

Basics

Front or back door key location

[Describe where it is; include a photo]

How to login to my laptop or computer

- **IMPORTANT: MAKE SURE THE LOCK FEATURE IS ACTIVATED ON YOUR SMARTPHONE**
- Password: [insert here] + Enter
- In my [e.g., mobile phone] Contacts, for various accounts, this password is sometimes referred to as [give your description], sometimes with additional symbols

How to login to my mobile phone

- Press the Power button and enter Code: [insert the code]
- **My mobile phone Contacts app** has information on my personal/household and work or business-related online accounts, including logins and account details and instructions

Personal documents, including birth certificate, Final Will and related documents, social security card, passport, etc., can be found electronically in [e.g., **Finder/Desktop/list the thread to the specific folder**]. These physical documents can be found in the [list the location]

Computer Matters

My Website manager is [list the name]

- Phone: [list phone number]
- Email:[list the email address]
- [For a business]: Ask [website manager] to place an announcement of my passing and any pertinent links at the top of my Home page
- Ask your website manager to keep the website up until [website manager] finds no more traffic to the site

Access my primary email account through [name the browser icon or other means of access].

I ask that news of my condition or passing be sent (bcc) through my email account to these email Contact labels:

- [label or group here]
- [label or group here]
- [label or group here]

FINAL INSTRUCTIONS

People to Contact Immediately Following My Death			
Title	Name	Phone	Address
[Family member]			
[Family member]			
[Family member]			
Funeral Director			
Primary Care Provider			
Mortgage Company or Property Manager			
Church/spiritual organization			
Attorney			
Local Social Security ofc.	Note: Checks are issued for the <i>previous</i> month		

People to Contact Before the [e.g., Funeral Service]

[Event location]

[Contact name]

[Phone number]

[List names and contact information for individuals who are good with spreading the word and arranging hospitality for the gathering]

[Names and contact information for individuals you want specifically to be present at the service]

People to Notify Within the First Week Following My Death

Organization	Name Address	Phone	Add'l info [e.g., acct. no., instructions]
Insurance Agent			
Personal [and Business] Checking and Visa Cards			
Social Security	Social Security Administration	800.325.0778	SSN: [insert here]
Post Office	[List address or location]		For mail forwarding
Internet provider	[List types of service]		See [e.g., Internet] Contacts for account details
Utilities	[List types of service]		See [mobile phone or billing statements]

Funeral and Burial Arrangements

1. Contact Funeral Director [Name], as noted above
2. Funeral expenses have [e.g., been paid for], except for [list]
3. I wish to have [kind of casket, urn]
4. I will be [e.g., buried, ashes spread] at [name of place, location]
5. I wish a [type of service, e.g., closed-casket, cremation, celebration of life]
6. Memorial contributions may be given in my name to [list the organization, address, contact information]

Elements of the Obituary

- Born to [parents, location, date; where childhood was spent]
- Graduated from [name of high school, location, year]
- Received a [degree] in [name of field] from [university or institute, location, year]; and a [second degree] in [name of field] from [university or institute, location, year]
- Was an active in [list what you were active in]
- She/he made [their] home in [name of town or area]
- She/he enjoyed [list what you enjoyed doing, what you were known for]
- She/he was preceded in death by [list]; and is survived by [list]
- Photo: **[insert the electronic file thread to the photo you want used]**

**Instructions for the
[e.g., Funeral Service, Memorial, Celebration of Life]**

Casket or Urn Bearers	List who you want
Opening [hymn or music]	List
Readings • • •	List the readings here, with suggestions on who will do the reading (note: bereaved family members may not be the most effective choice)
Eulogy	Put instructions here

Disposition of Personal and Household Matters

1. My **personal correspondence**, in [location], shall be [e.g., destroyed, unread]
2. All **jewelry and personal items of value** shall be offered to [list names, addresses or contact information if needed]; or donated to [list where]
3. All **clothing** in clean and worthy condition, shall go to [list where]
4. **Kitchen and tableware** shall go to [list to whom or where]
5. [**Specific keepsakes, etc.**] shall go to [list to whom or where]
6. Contents of my **photo albums** shall go to [e.g., family and extended family members, according to their preference]. Any remaining photos may be destroyed
7. My **books, music media [and related items]** shall go to [e.g., any family members who wish to have them]; remaining items shall go to: [list where]
8. [**Keepsake furniture, wall hangings, etc.**] shall go to [e.g., family members who wish to have them]; remaining items shall go to [list where]
9. All **remaining household items** shall go to [e.g., family members or friends who wish to have them]; remaining items shall go to [list where]

Business Matters: Overview

I have [outstanding debts as follows: list here, or] no outstanding debts, other than whatever medical and incidental funeral expenses may be pending, plus current business and personal credit card charges

Refer tax matters to [list CPA, phone number, email, and location address]

Refer investment matters to [list investment manager, email, and location address]

Tax records for the past several years are in [list the location]

My Business Identification Number with [e.g., the State of Oregon Secretary of State, Corporate Division], is: [list the number]

My Federal Employer Identification Number (EIN) is: [list the number]

My [list particular items of office equipment] shall be donated to [name or organization, with phone number] for [e.g., administrative use]

My [e.g., laptop or computer and external backup drive] shall be retained for access to files as needed.

Office filing cabinet drawers contain:

- **Drawer #1:** List the contents
- **Drawer #2:** List the contents
- **Drawer #3:** List the contents
- **Drawer #4:** List the contents

Emergency and Final Instructions updated and approved on [date].

[Insert your signature here]
