When I'm Gone

The Organizer That Tells Your Family
Everything They'll Need - and What To Do First

FREE SAMPLE - 10 pages from the full 140-page organizer
(fillable + printable edition)

Large-print friendly - US Letter & A4 - Replace-a-page update system
Administrative organizer only - not a will or legal advice

How To Use This Organizer

Fill in what you can, a page at a time. Nobody completes this in one sitting, and you do not need to: even three finished sections are a gift to the people who will one day need them.

Work in this order if you are starting from zero: (1) Who To Call, (2) Where Everything Is, (3) Money & Accounts, (4) My Digital Life, (5) Final Wishes. The order matters - it is the order your family will need things.

The replace-a-page system

Life changes one fact at a time: a new bank, a sold car, a grandchild. Every section of the full organizer is a self-contained page set, so you can reprint and swap a single page instead of starting over - and each page carries a 'last updated' line so your family always knows which version is current.

Where to keep it

Tell at least two people where the finished organizer lives. A perfect organizer nobody can find is just paper. Common choices: a labeled binder at home plus a copy with your executor or attorney.

A note on passwords

This organizer never asks you to write down passwords. Instead, it records WHERE your passwords live (for example, which password manager you use and who can access it) so your digital life stays secure now and reachable later.

This organizer is an administrative record-keeping tool. It is not a will, trust, or other legal document, and it is not legal, financial, tax, or medical advice. Beneficiary designations, account titles, and your actual legal documents control what happens to your property - this organizer simply helps the people you trust find everything and act quickly. Have an attorney in your state prepare or review your legal documents.

Inside the Full Organizer

140 pages. This sample contains the pages marked with a dot.

Section 1 - Who To Call

- Emergency & family contacts [in this sample]
- Doctors, attorney, accountant, clergy
- Employer & benefits contacts

Section 2 - Where Everything Is

- Document location map [in this sample]
- Keys, safes & storage
- Property & vehicles

Section 3 - Money & Accounts

- Bank & investment accounts [in this sample]
- Insurance policies
- Debts & recurring bills
- Benefits: pensions, Social Security, veterans

Section 4 - My Digital Life

- Password-manager pointer page [in this sample]
- Email, phone & cloud accounts
- Subscriptions to cancel

Section 5 - Final Wishes

- Funeral & memorial preferences
- Burial / cremation & prepaid arrangements
- Obituary notes & who to notify

Section 6 - The Executor Playbook

- The first 72 hours [in this sample]
- The first week
- The first month
- Settling in: months 2-12

Update Pack

- Replace-a-page sheets for every section
- Annual review checklist

Who To Call

Section 1 - sample page. Fill in the people your family will need first.

Spouse / partner - name & phone _____

Child / family #1 - name & phone _____

Child / family #2 - name & phone _____

Executor / trustee - name & phone _____

Attorney - name & phone _____

Accountant / tax preparer - name & phone _____

Primary doctor - name & phone _____

Clergy / faith leader - name & phone _____

Employer / benefits office - name & phone _____

Insurance agent - name & phone _____

Full name of this organizer's owner: _____ Date of birth: _____

Home address _____

Where Everything Is

Section 2 - sample page. Locations only - the documents themselves stay where they are.

Will (original) - located at _____

Trust documents - located at _____

Deed(s) / property records - located at _____

Vehicle titles - located at _____

Insurance policies - located at _____

Safe-deposit box (bank & #) - located at _____

Home safe (location) - located at _____

Birth / marriage certificates - located at _____

Military / DD-214 records - located at _____

Tax returns (last 3 yrs) - located at _____

Tip: photograph this page and keep the photo with your executor. Locations change; update this page whenever you move a document - that is what the replace-a-page system is for.

Money & Accounts

Section 3 - sample page. Institutions and account types only - never write full account numbers or passwords here beyond the last 4 digits.

Checking - bank

Savings - bank

Retirement (IRA/401k)

Brokerage / investments

Life insurance - company

Home / auto insurance

Mortgage / lender

Credit cards (issuer + last 4)

Other accounts / notes

My Digital Life

Section 4 - sample page. Pointers, not passwords.

Password manager I use _____

Who can access it in an emergency _____

Primary email account _____

Phone carrier & plan _____

Cloud storage (photos/files) _____

Social media accounts _____

Online banking / bill pay via _____

Subscriptions to cancel (list on full page in organizer) _____

Modern estates stall on digital access more than on money. One completed page here saves your family weeks of locked accounts and lost photos.

The Executor Playbook

Section 6 - excerpt. The full playbook covers the first 72 hours, the first week, the first month, and months 2-12.

First 72 hours - the order matters

1. Pronouncement and notification of immediate family.
2. Secure the home, pets, mail, and perishables.
3. Find the final-wishes notes before making funeral decisions.
4. Funeral home engaged; order 10-15 certified death certificates.
5. Locate the will; start the call log notebook.
6. Notify employer/benefits and Social Security.
7. Freeze individual accounts against fraud; notify insurers about the empty home.
8. Photograph everything before anything is moved or given away.

Each step appears in the playbook as a full checklist with phone scripts, the questions to ask, and the mistakes that are expensive to undo - like paying individual debts before counsel, or closing joint accounts too early.

Why a playbook, not just forms

Forms record facts. A playbook sequences actions under stress, for a person who has never done this before and is grieving. That sequencing is what no other organizer on the market currently provides.

Keeping It Current

The update system, and what the full organizer adds.

Annual review checklist (excerpt)

- [ ] Bank or investment accounts opened/closed?
- [ ] Insurance beneficiaries still correct?
- [ ] Executor or guardians changed?
- [ ] New property, vehicle, or pet?
- [ ] Password manager or primary email changed?
- [ ] Any document moved to a new location?

In the full 140-page organizer

- Every section in this sample, completed in depth (multiple pages per section)
- The complete Executor Playbook: first 72 hours, first week, first month, months 2-12
- Final Wishes section, including obituary notes and notification lists
- Benefits pages: pensions, Social Security, and veterans benefits contacts
- Fillable PDF fields throughout (type, don't handwrite, if you prefer)
- The complete replace-a-page Update Pack and annual review system
- Editions: Standard, Couples, Single Parent, Blended Family, Pet Owner

Start With Page One

If this sample is useful, the single most valuable hour you can spend this month is completing Section 1 (Who To Call) and Section 2 (Where Everything Is) of the full organizer. Everything else can be added a page at a time - that is exactly how it was designed.

The full organizer is available as an instant download (fillable + printable PDF, US Letter & A4) with the complete Executor Playbook and Update Pack included.

> *A free companion checklist - 'The Executor's First 72 Hours' - is available wherever you found this sample. Keep a copy with your will; it is the page your family will need first.*

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