



A THOUGHTFUL START

Life Transition Starter Checklist

A calm, practical place to begin organizing the information your loved ones may one day need.

PREPARED BY

LAST UPDATED

Preparation is a form of love.

Personal & Household Essentials

PERSONAL INFORMATION

Gather the basics

- ☐ Full legal name, date of birth, and Social Security number
- ☐ Copies of driver's license, passport, and other identification
- ☐ Marriage, divorce, adoption, and military service records
- ☐ Current address and previous addresses that may matter
- ☐ Location of birth certificate and other original documents

HOME AND DAILY LIFE

Keep life moving

- ☐ Mortgage or lease details and where the documents are stored
- ☐ Utility, insurance, maintenance, and security contacts
- ☐ Vehicle information, titles, keys, and service contacts
- ☐ Important routines, subscriptions, deliveries, and memberships

NOTES / WHERE IT IS KEPT

Contacts, Health & Wishes

PEOPLE TO CONTACT

Build your circle

- ☐ Primary family contact and a backup contact
- ☐ Attorney, financial professional, tax preparer, and insurance agent
- ☐ Doctor, pharmacy, care team, and preferred hospital
- ☐ Employer, faith community, neighbors, or trusted friends to notify

HEALTH AND CARE PREFERENCES

Share what matters

- ☐ Current medications, allergies, diagnoses, and medical history
- ☐ Health insurance cards, policy numbers, and account access details
- ☐ Advance directive, health care proxy, and power of attorney location
- ☐ Preferences for care, comfort, mobility, and spiritual support
- ☐ Organ, tissue, or body donation preferences, if any

NAMES, NUMBERS & DOCUMENT LOCATIONS

Financial, Property & Digital Life

FINANCIAL AND PROPERTY

Create a clear map

- ☐ Bank, retirement, investment, credit, and loan accounts
- ☐ Life, health, home, auto, and long-term care insurance policies
- ☐ Real estate, vehicles, valuables, business interests, and safe-deposit boxes
- ☐ Recurring bills, automatic payments, income, and tax records
- ☐ Beneficiary designations and the location of estate documents

DIGITAL LIFE

Protect access

- ☐ Password manager or secure instructions for accessing important accounts
- ☐ Primary email, phone passcode, cloud storage, and device information
- ☐ Social media, websites, subscriptions, and digital payment accounts
- ☐ Instructions for photos, files, digital assets, and account closure

SECURE STORAGE LOCATION / ACCESS INSTRUCTIONS

Loved Ones, Pets & Personal Wishes

DEPENDENTS AND PETS

Plan for continued care

- ☐ Names, routines, medical needs, schools, caregivers, and key contacts
- ☐ Preferred temporary and long-term caregivers
- ☐ Pet veterinarian, medications, feeding routine, and care preferences
- ☐ Funds, supplies, documents, and written instructions for ongoing care

LEGACY AND PERSONAL WISHES

Preserve your voice

- ☐ Will, trust, power of attorney, and final-arrangement documents
- ☐ Funeral or memorial preferences and people to involve
- ☐ Letters, stories, recipes, photos, keepsakes, and family traditions
- ☐ Gifts, charitable wishes, heirlooms, and the stories behind them
- ☐ Anything you want loved ones to know, remember, or carry forward

WHAT MATTERS MOST TO ME

Your Next Steps

You do not have to finish everything today. Choose one small action, then return when you are ready.

THIS WEEK

Start small

- ☐ Choose one trusted person and tell them you are organizing this information
- ☐ Gather identification and your most important legal documents
- ☐ List your primary contacts, medications, and insurance information
- ☐ Choose a safe, accessible place to keep this checklist

THEN KEEP GOING

Review regularly

- ☐ Schedule time to complete one section at a time
- ☐ Ask qualified professionals to review legal, financial, and medical plans
- ☐ Tell your trusted person where the originals and secure access details are kept
- ☐ Review this information after major life changes and at least once each year

One thoughtful step today can bring clarity tomorrow.

For organizational and educational purposes only. This checklist does not replace a valid will, advance directive, power of attorney, or advice from a qualified legal, financial, or medical professional.