



Get your crap together so your Family won't have to!



CARINGHUB

quick start guide for your survivors

CaringHub.net

our mission

Provide the tools and resources to help you

Get your crap together so your Family won't have to!

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FOR EVERYONE

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FOR VETERANS AND MEMBERS
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FOR BABY BOOMERS

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GET IT DONE QUICKLY

The Original Edition
FOR EVERYONE

CARINGRUB
"Offers a quick and easy way to gather your important papers, life documents and final wishes so your family won't have to."
—TIMES UNION

CARINGRUB
"Offers a quick and easy way to gather your important papers, life documents and final wishes so your family won't have to."
—TIMES UNION

YUP I'M DEAD... NOW WHAT?
Get your crap together so your Family won't have to!

- Gather Important Documents
- Document Final Wishes
- Protect and Prepare Your Family
- Get Your Crap Together in 30 Days or Less

Includes Downloadable FORMS

QUICK START GUIDE Included

THE VETERAN EDITION

THE DELUXE EDITION

Forms, Resources, Links, Shortcuts and Tips

Forms, Resources, Links, Shortcuts and Tips

GET THE BOOKS

YUP I'M DEAD... NOW WHAT?

get your crap together so your Family won't have to!

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get your
crap
together
so your
family won't
have to!

No one wants to contemplate their own death. But, reality, is that everyone will "depart" sooner or later. That is why you must plan for it. The last thing we want is to have our family members burdened with difficult decisions during the most stressful time of their lives. The Yup I'm Dead...Now What? Planner will guide and direct them through these difficult times in the days, weeks and months following your Departure.

Click the image below to get the
Books on Amazon



Your letter of instruction

Getting your crap together requires a thoughtful plan that clearly spells out your wishes for settling your affairs and estate, and your final wishes and funeral. It's best to start with a Letter of Instruction

Your Letter of Instruction is a list of essential information to help your survivors cope during a difficult time. Unlike a will, the letter does not have any legal authority, but it can provide an easy to understand explanation of your overall estate plan for your executor. It can also serve as a guide for anyone involved in settling your affairs and provides them with a ready point of reference on items such as:

- Funeral arrangements and wishes.
- Contact information for people to be notified.
- Location of important documents.
- Intended use of life insurance proceeds and other assets.
- Passwords, codes, or keys required to access stored information.
- Personal messages for your loved ones.

Keep your letter of instruction updated, since the information is likely to change over time. Provide copies to your executor(s).

If your wishes include donating your body organs or tissues to transplant facilities, you will need to sign the proper forms to authorize the donation. In some states, you can do this as part of renewing your driver's license or by obtaining the form from your local department of motor vehicles (DMV). Visit organdonor.gov to register in your state. Notify your family of your decision to donate and update your will and living will.



Keep your documents safe

This publication is designed so you can record important personal and financial information. Store this information in a secure location away from your residence. It contains sensitive information that can be misused in the wrong hands. Handle your completed work sheets with care and caution.

This publication is only a guide. CaringHub does not provide legal or tax advice, so you may want to seek the advice of tax, legal or financial planning professionals.

your last will & testament

What you need to know:

- In most states, you must be 18 years of age or older.
- A will must be written in sound judgment and mental capacity to be valid.
- The document must clearly state that it is your will.
- An executor of your will, who ensures your estate is distributed according to your wishes, must be named.
- It is not necessary to notarize or record your will but these can safeguard against any claims that your will is invalid. To be valid, you must sign a will in the presence of at least two witnesses.

Source: usa.gov/topics/money/personal-finance/wills.shtml



LEGAL DEFINITION:

Intestate adj. referring to a situation where a person dies without leaving a valid will. This usually is voiced as “he died intestate,” “intestate estate,” or “intestate succession.”

Source:

legal-dictionary.thefreedictionary.com/Intestate

A woman with dark hair is smiling and looking down at a baby she is holding. The baby is wearing a light-colored, ruffled shirt. The entire image is overlaid with a semi-transparent purple filter. The text 'making your wishes known: your will' is written in white, bold, sans-serif font in the upper left corner.

making your wishes known: your will

Your will is the primary document for establishing how your estate and affairs will be settled. Also known as a last will and testament, your will is a legal document that specifies who gets your property when you die. Generally, it is also used to name a guardian for your minor children and to name executor(s) for your estate. The executor(s) will handle your affairs when the time comes to probate the will. Be sure to notify your survivors and executor(s) where your will is located.

other types of wills

Living Will

A living will outlines medical procedures you want taken if you become too ill to state your wishes, including life support decisions. Each state has its own regulations and forms for living wills. You may obtain the proper form from an attorney or through some state medical associations. Include the names of those who have copies of your living will and directive to physicians.

Durable Power of Attorney (DPOA)

Similar to a POA, a DPOA generally remains in effect if you become incapacitated and unable to manage your own personal and financial affairs. Include the full name of the agent you appoint, and again, consider naming a successor agent in the event that your first choice is unable or unwilling to perform the duties. A DPOA is generally effective until you revoke it or you die.

Springing Power of Attorney

Sometimes called a conditional power of attorney, this legal document is a type of DPOA document that can “spring” into effect only when a specific event occurs such as if you become incapacitated. Include the full name of the agent you appoint, and consider naming a second agent in the event that your first choice is unable or unwilling to perform the duties. Once activated, a springing power of attorney generally is effective until you die or a court revokes it.

Power of Attorney (POA)

A POA is written authorization for someone to act on your behalf for whatever purpose you designate (for example, handling your financial affairs while you are out of the country). Include the name of the agent you appoint. Consider naming a successor agent in the event that your first choice is unable or unwilling to perform the duties. Be sure to put the POA on file with financial institutions to avoid delays when needed. A POA terminates upon your death or upon notice from you.

Health Care Power of Attorney (HCPOA)

A HCPOA allows you to appoint someone else to make health care decisions on your behalf if you become incapacitated. Include the full name of the agent you appoint, and again, consider naming a secondary agent in the event that your first choice is unable or unwilling to perform the duties. Be sure medical providers have a copy of the POA.

Trusts

A trust is a fiduciary arrangement that allows a third party, or trustee, to hold assets on behalf of you or your beneficiaries. Trusts can be arranged in many ways and can specify exactly how and when the assets pass to the beneficiaries. Since trusts usually avoid probate, your beneficiaries may gain access to these assets more quickly than they might to assets that are transferred using a will. This is what you'll want to include in your trust document.

wills & power of attorney

My Name: _____

Use the following form to record your information about wills and power of attorney.

Updated as of: _____

YOUR WILL	HEALTH CARE POWER OF ATTORNEY (HCPOA)
Date Executed	Date Executed
Location of Document	Location of Document
Attorney	Name
LIVING WILL	Address
Date Executed	Phone
Location of Document	E-mail
Name	SPRINGING POWER OF ATTORNEY
Address	Date Executed
Phone	Location of Document
E-mail	Name
POWER OF ATTORNEY (POA)	Address
Date Executed	Phone
Location of Document	E-mail
Name	TRUSTS
Address	Date Executed
Phone	Location of Document
E-mail	Name of Trust
DURABLE POWER OF ATTORNEY (DPOA)	Name of Grantor(s)
Date Executed	Name of Trustee(s)
Location of Document	Name of Beneficiary(ies)
Name	Address
Address	Phone
Phone	E-mail
E-mail	

other contacts

My Name: _____

List the names of those who will need to be notified of your death.

Updated as of: _____

EXECUTOR/EXECUTRIX	OTHER FINANCIAL ADVISER
Name	Name
Address	Address
Phone	Phone
E-mail	E-mail
ATTORNEY	RELIGIOUS LEADER
Name	Name
Address	Address
Phone	Phone
E-mail	E-mail
GUARDIAN	FUNERAL DIRECTOR/CEMETERY/MORTUARY
Name	Name
Address	Address
Phone	Phone
E-mail	E-mail
BROKER/FINANCIAL MANAGER	ORGAN DONOR FACILITY
Name	Name
Address	Address
Phone	Phone
E-mail	E-mail
ACCOUNTANT/TAX ADVISOR	EMPLOYER
Name	Name
Address	Address
Phone	Phone
E-mail	E-mail

other contacts pt. 2

My Name: _____

Updated as of: _____

TITLE INSURANCE AGENT	FAMILY MEMBER #1
Name	Name/Relationship
Address	Address
Phone	Phone
E-mail	E-mail
LIFE INSURANCE AGENT	FAMILY MEMBER #2
Name	Name/Relationship
Address	Address
Phone	Phone
E-mail	E-mail
ORGANIZATIONS/MEMBERSHIPS <i>(service, fraternal, military, college alumni associations, etc.)</i>	FRIEND #1
Name	Name
Address	Address
Phone	Phone
E-mail	E-mail
ORGANIZATION #2	FRIEND #2
Name	Name
Address	Address
Phone	Phone
E-mail	E-mail

social media wishes



If you are active online you should indicate your wishes on how you would like your online identity to be handled. You should appoint someone you trust as an online executor. This person will be responsible for the closure of your email addresses, social media profiles, and blogs after you depart. Take these steps to help you write a social media wishes:

- Review the privacy policies and the terms and conditions of each website where you have a presence.
- State how you would like your profiles to be handled. You may want to completely cancel your profile or keep it up for friends and family to visit. Some sites allow users to create a memorial profile where other users can still see your profile but can't post anything new.
- Give the social media executor a document that lists all the websites where you have a profile, along with your usernames and passwords.
- Stipulate in your will that the online executor should have a copy of your death certificate. The online executor may need this as proof in order for websites to take any actions on your behalf.
- Check to see if the social media platforms have account management features to let you proactively manage what happens to your accounts after you die. For example, Google's Inactive Account Manager allows you to manage how you want your online content to be saved or deleted. This feature also lets you give permission for your family or close friends to access the content you saved on Google websites after you die.

Source: [usa.gov/topics/money/personal-finance/wills.shtml](https://www.usa.gov/topics/money/personal-finance/wills.shtml)

Social network accounts

Social media accounts are constantly changing. It's important to have a plan of action that goes into effect as soon as a life situation occurs. You'll want to permanently close unused social media accounts. If a loved one dies, make sure survivors know what to do with remaining social media accounts. As the number of abandoned accounts has increased, some social media websites have established policies for survivors to delete, update, transfer or possibly preserve the accounts. In addition, there are services available to help your survivors manage your social media accounts after your death. Policies for closing accounts vary. For specific instructions, contact the company directly.

SOCIAL MEDIA SITES

WEBSITE ADDRESS

Username
.....
Password
.....

WEBSITE ADDRESS

Username
.....
Password
.....

WEBSITE ADDRESS

Username
.....
Password
.....

taking care of financial matters

Upon your departure, financial matters can get complicated very quickly without a specific plan of action. You'll want to consult with your attorney, accountant, and possibly your beneficiaries to plan on how your estate will be settled.



get the books on Amazon

INVESTMENTS

Updated as of: _____

Your survivors or executor(s) may need an inventory of your investments including stocks, bonds and mutual funds.

FINANCIAL INSTITUTION	FINANCIAL INSTITUTION
Name	Name
Address	Address
Phone	Phone
E-mail	E-mail
Investment Type	Investment Type
Account Number	Account Number
Joint Owner's Contact Information	Joint Owner's Contact Information
<input type="checkbox"/> Transfer on Death (TOD)	<input type="checkbox"/> Transfer on Death (TOD)
Beneficiaries	Beneficiaries
Location of Statements	Location of Statements

EMPLOYEE SAVINGS/PENSIONS/RETIREMENT PLANS

Your survivors or executor(s) must contact each source about any income still due and check for death provisions from your pension and retirement plans. Contact your tax and legal advisers regarding your specific situation prior to taking a distribution from a retirement plan.

EMPLOYER/FORMER EMPLOYER(S)	EMPLOYER/FORMER EMPLOYER(S)
Name	Name
Address	Address
Phone	Phone
E-mail	E-mail
Type of Plan	Type of Plan
Value	Value
Beneficiaries	Beneficiaries
Location of Statements	Location of Statements

LOAN PAYMENTS/CREDIT CARD ACCOUNTS/HOUSEHOLD EXPENSES

Updated as of: _____

Your survivors or executor(s) must know what routine bills or payments are due. Your executor(s) may have to close these accounts.

List all outstanding loans, balances on accounts and monthly household expenses. Update as needed.

CREDITOR #1

Name	Name
Address	Address
Phone	Phone
E-mail	E-mail
Account Number	Account Number
<input type="checkbox"/> Individual <input type="checkbox"/> Joint	<input type="checkbox"/> Individual <input type="checkbox"/> Joint
Joint Owner's Contact Information	Joint Owner's Contact Information
Credit Life <input type="checkbox"/> Yes <input type="checkbox"/> No	Credit Life <input type="checkbox"/> Yes <input type="checkbox"/> No
Due Date	Due Date
Amount Due	Amount Due
\$	\$
Location of Statements	Location of Statements

CREDITOR #2

CHECKING & SAVINGS ACCOUNTS/CERTIFICATES OF DEPOSIT (CDs)

ACCOUNT #1

Name
Address
Phone
E-mail
Account Number
<input type="checkbox"/> Individual <input type="checkbox"/> Joint <input type="checkbox"/> Payable on Death (POD)
Joint Owner's Contact Information
Average Account Balance
\$
Location of Statements

ACCOUNT #2

Name
Address
Phone
E-mail
Account Number
<input type="checkbox"/> Individual <input type="checkbox"/> Joint <input type="checkbox"/> Payable on Death (POD)
Joint Owner's Contact Information
Average Account Balance
\$
Location of Statements

insurance policies

Life Insurance



Life insurance can be used to financially protect your loved ones in a number of ways:

- To pay for final expenses
- to pay for anticipated state and/or federal estate taxes
- to pay off remaining debts and/or obligations of the decedent
- to provide funding to pay for future goals, such as a child's education
- to provide funding for a survivor's long-term financial well-being
- to pay anticipated income taxes on tax-deferred assets.

It's important to periodically review your life insurance coverage and policies to ensure they remain properly arranged.

My Name: _____

LIFE INSURANCE Updated as of: _____

Life insurance is designed specifically to protect your family's financial security. The proceeds from life insurance can prove to be a helpful source of cash for the loved ones you've left behind. List the name of the policy's owner and your beneficiaries. Make sure to update this section or Chapter 15 in the *Yup I'm Dead...Now What?* Book whenever beneficiaries change on a policy.

Name
.....

Address
.....

Agent
.....

Phone
.....

E-mail
.....

Policy Number/Owner
.....

Face Value/Premium
.....

Beneficiaries
.....

Location of Policy
.....

OTHER INSURANCE POLICIES

List your insurance policies. For their benefit, your survivors may want to continue paying the premiums to keep these policies in force after your departure.

HEALTH INSURANCE		DISABILITY INSURANCE	
Type of Policy		Type of Policy	
Name		Name	
Address		Address	
Agent		Agent	
Phone		Phone	
E-mail		E-mail	
Policy Number/Owner		Policy Number/Owner	
Premium		Premium	
Location of Policy		Location of Policy	
DENTAL INSURANCE		LONG-TERM CARE INSURANCE	
Type of Policy		Type of Policy	
Name		Name	
Address		Address	
Agent		Agent	
Phone		Phone	
E-mail		E-mail	
Policy Number/Owner		Policy Number/Owner	
Premium		Premium	
Location of Policy		Location of Policy	
HOMEOWNERS/AUTO/RENTERS/OTHER INSURANCE			
Type of Policy		E-mail	
Name		Policy Number/Owner	
Address		Premium	
Agent		Location of Policy	
Phone			

protecting your property

Generally, your will contains two types of gifts: specific and general. A general gift is a share of the property that remains after specific gifts — typically personal items like jewelry, etc. — are made. The people who receive these general gifts are known as “principal beneficiaries” because they usually receive the bulk of the estate after smaller gifts and valuables are disbursed. A principal beneficiary is often the last will maker’s spouse or closest relative. You are responsible for assigning who the beneficiaries will be. Each last will must have at least one principal beneficiary.

PROPERTY OWNERSHIP

My Name: _____

Updated as of: _____

List any real estate or other property you own.

ADDRESS OF PROPERTY OWNED	LOCATION OF TITLE DOCUMENTS

MORTGAGES

Updated as of: _____

List any outstanding mortgages.

MORTGAGE COMPANY	DUE DATE/ AMOUNT DUE	ACCOUNT NUMBER	LOCATION OF TITLE DOCUMENTS
Name			
Address			
E-mail			
Phone			
Name			
Address			
E-mail			
Phone			

RENTALS

Updated as of: _____

Include post office boxes, storage units and other property you rent.

RENTAL PROPERTY	NAME/ADDRESS	RENT DUE DATE/ AMOUNT DUE	REFUNDABLE DEPOSIT DUE	LOCATION OF KEY
Include property you rent to others.				

personal property inventory

An inventory of your possessions is helpful not only to determine your estate value and to name recipients, but for insurance claims as well. Create a record of your possessions, including purchase price, date purchased, serial number and receipt. Supplement your inventory with photographs. For convenience, keep a separate, central file of all warranties, with corresponding proofs of purchase and operating instructions for appliances and other equipment.

My Name: _____

Updated as of: _____

ITEM/DATE PURCHASED	PURCHASE PRICE	RECEIPT YES/NO	SERIAL NUMBER	RECIPIENT(S)	LOCATION

List passenger vehicles, motorcycles, boats and other vehicles.

VEHICLE TYPE	YEAR/MAKE/ MODEL	TITLE/REGISTRATION LOCATION	VEHICLE IDENTIFICATION NUMBER

protecting your personal information

Over a lifetime, you naturally accumulate a lot of documents and data that contain your and your family's personal information. For obvious reasons, you don't want this information getting lost or into the wrong hands. Taking steps now to organize and secure this information will help your family avoid any future issues.

Secured storage

Make sure your inventory, receipts, photographs and important financial, insurance and legal documents are securely stored. It is recommended that you store sensitive information in a secure location away from your residence, such as a safe deposit box at a bank or a safe in your attorney's office. A key consideration is whether your executor(s) will have convenient access to the documents upon your death. Since some states may restrict or limit access to a bank safe deposit box upon the death of the owner, you should consult your legal adviser or financial planning professional to determine the option which best balances security and access in order to achieve your planning purposes.



personal documents

When it comes to your peace of mind and making sure your wishes are known, it's important to be prepared. Record details about important personal documents, your daily routines and key contacts and make sure they're always up to date. If you become ill or incapacitated, a family member or other trusted individual will know whom to notify and will have the information needed to manage your affairs.

My Name: _____

Secure this information, and tell your spouse, executor, successor, trustee or family member how to find it. Updated as of: _____

DESCRIPTION	LOCATION OF INFORMATION
Social Security number (SSN)	
Driver's license number/State issued	
Birth certificate/Adoption papers	
Marriage license and certificate	
Divorce/Separation papers	
Statement of Service (DD Form 214)/Retirement orders/Last active duty pay statement/ First retired pay statement/VA disability	
Retirement orders/Last active duty pay statement/First retired pay statement/VA disability	
Tax records for current and most recent years. Include copies of any gift or estate tax returns filed over the most recent years.	
Passport number	
Tax identification number	
Appraisals for valuables such as jewelry, furs and musical instruments	
Deeds, car titles, and insurance records	
All legal documents including wills, living wills, durable powers of attorney, health care powers of attorney, trust documents, business agreements, mortgages, etc.	
Bank statements, brokerage statements, insurance policies, and safety deposit boxes	

safety & security

My Name: _____

Updated as of: _____

SAFE/SAFE DEPOSIT BOX LOCATION

Name	Contents
Address	Executor(s)
Phone	Box Number
E-mail	Location of Key

MISCELLANEOUS ITEMS Consider your daily and monthly routines. Record details as you identify new items to add to this list.

ITEMS	DETAILS
Pet(s) — food and schedule	
List of medications and dosage instructions for your pet(s)	
Veterinarian information	
Names of those who may want your pet(s)	
Secret hiding places for selected items	
Security system company and codes	
Locations of spare keys to home, vehicle, safe deposit box, garage, etc.	
Name of anyone else who has keys	
Codes to combination locks	
Location of your address book(s)	
Location of firearms and ammunition	
Subscriptions to publications	
Memberships in movie, book or music clubs	
Manuals and warranties	
Backups of important documents	
Other	

planning the service/ memorial service

My Name: _____

The three basic types of funerals are “traditional” full-service, direct burial and direct cremation. Updated as of: _____

TRADITIONAL SERVICE	YOUR PLANS
<ul style="list-style-type: none">• A viewing or visitation is included• A hearse usually transports the body to the funeral location and burial site	
For a traditional service, consider the following:	
<ul style="list-style-type: none">• Do you prefer an open or closed casket?• Specify the clothing or jewelry you want to be buried in• Would you like the service at the funeral home, place of worship or graveside?• Who do you want to conduct the service?• Who do you want as pallbearers?• Who would you like to speak at the service?• Do you want live or recorded music? Which selections?	
DIRECT BURIAL	YOUR PLANS
<ul style="list-style-type: none">• The body is buried shortly after death• There is no viewing or visitation; the body is not embalmed• A memorial service may be held graveside, place of worship or another location	
DIRECT CREMATION	YOUR PLANS
<ul style="list-style-type: none">• The body is cremated shortly after death• The cremains are placed in an urn or other type of container• There is no viewing or visitation. A memorial service may be held with or without the cremains.• The cremains may be kept by a family member, scattered in a favorite location or buried in a grave or mausoleum. Check with state or local laws if you choose to have your cremains scattered.	

funeral services comparison

FUNERAL HOME NAME				
A.	C.			
B.	D.			
SERVICES	COST			
	A	B	C	D
Transport the body to the funeral home.	\$	\$	\$	\$
Prepare the body				
Embalming*				
Burial				
Cremation				
Casket**				
Hearse				
Transport the body to the service				
Limousine(s) for the family				
Police escort(s), if required				
Facilities for viewing the body				
Tents and chairs for the guests at the burial				
Memorial cards and guest book				
Select flowers for the service				
Prepare the obituary				
File death certificates and provide copies				
Notify organizations to which the deceased belonged				
Assist in completing the forms for a veteran's flag				
TOTAL COST	\$	\$	\$	\$

*Embalming is a chemical process that cleanses and preserves the body for cosmetic purposes. The law does not normally require it, although some states may require it when the body will be transported by freight or the funeral is delayed for several days. You will be asked to sign a form consenting to the embalming, but you have the right to refuse this service if you choose. Some religions do not permit embalming and it is best to discuss this with your religious leader.

**Caskets are intended for the viewing, the services and for transportation to the cemetery. They do not preserve the body.

access more resources at **CaringHub.net**



Prepare and Protect your Family by providing them with the information and step-by-step guidance they will need in the days, weeks and months, following your "Departure".

Where to Find it Master List

Will Checklist

Making a Will: 8 Important Things

Important Documents Checklist

What Happens When You Die

14 Things to Do Before You Die

How to Write a Personal Wishes Letter

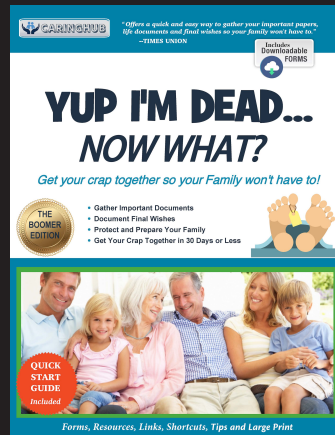
How to Manage a Digital Legacy after Someone Dies

Click here to see all our Books on Amazon or select from below:

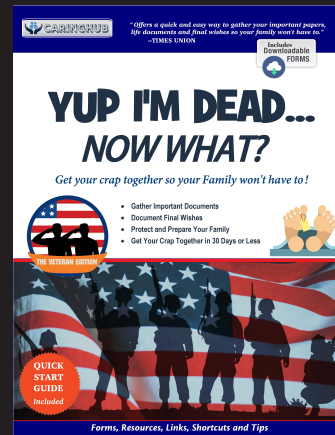
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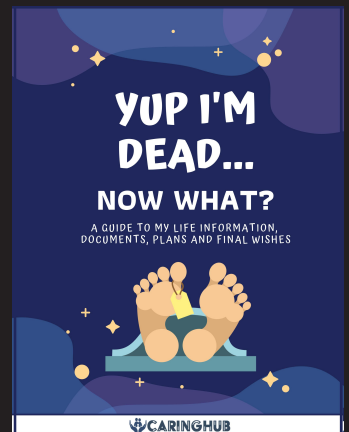
The Boomer Edition



The Veteran Edition



The Original Edition



www.caringhub.net



info@caringhub.net

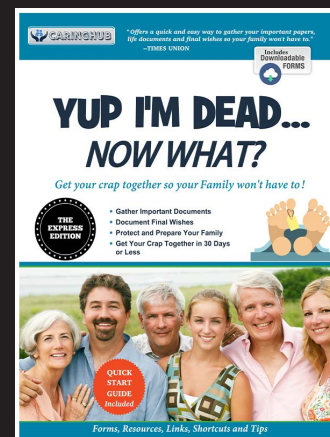


facebook.com/caringhubnet



pinterest.com/caringhubnet

The Express Edition



FOR MORE RESOURCES
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***Get your crap together so your Family
won't have to!***

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