

An indispensable guide to help people organize, plan for, and share personal intentions and other information related to end of life.



THE
LASTINGMATTERS™
ORGANIZER
SAMPLER

Where loved ones find
what matters most

BARBARA BATES SEDORIC

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CHAPTER 1

IMMEDIATE MATTERS

*“The single biggest problem in
communication is the illusion
that it has taken place.”*

-GEORGE BERNARD SHAW


Instructions for loved ones to help them in the days immediately following your death.

Whether your death is sudden or expected, your loved ones will be dealing with a lot of emotion in the period right after your passing. Unfortunately, this is a time when family and friends will need to make immediate and critical decisions.

This chapter will walk you through the essential information your loved ones need in order to make final arrangements in the days and weeks immediately following your death.

In this chapter

- 1 : A Personal Note
- 2 : List of People to Notify
- 3 : Power of Attorney
- 4 : Autopsy
- 5 : Organ or Body Donation
- 6 : Cremation or Burial
- 7 : Biographical Data
- 8 : Obituary
- 9 : Passwords/Combinations/Pin Numbers
- 10 : Funeral and/or Memorial Service
- 11 : Pets/Horses/Livestock/Exotic Animals
- 12 : Household/Service Providers
- 13 : Will and Trusts
- 14 : Employment



Helpful information to gather before you begin:

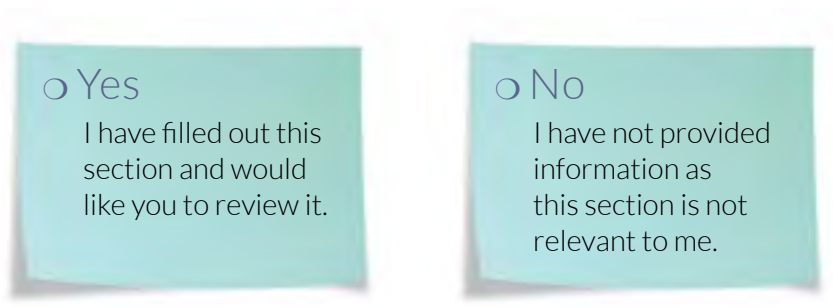
- ✓ Addresses and contact information of people closest to you or involved in your everyday life
- ✓ Passwords, combinations and pin numbers
- ✓ Driver's license
- ✓ Birth certificate
- ✓ Marriage certificate
- ✓ Employment benefit documents

7 Biographical Data

Organizing all of your essential biographical information in one spot is a great way to help loved ones quickly find the common information they'll be asked for in any number of situations after your death.

Remember to keep this updated as phone numbers and addresses can change.

To my loved ones:



About you

Full name:

Residential address:

Mailing address (if different):

Employer name/company name:

Employment address :

Date of birth:

Place of birth:

Location of birth certificate:

Mobile phone:

Home phone:

Work phone:

Marital status:

Spouse's full name:

Spouse's maiden name:

Location of marriage license / certificate:

Children and dependents

List full names, addresses and birth dates:

Parents and stepparents

List names, addresses and birth dates:

Siblings

List names, addresses and birth dates:

Social security number

List Number:

Card location:

Passport

List Number:

Passport location:

Driver's license

List number and state:

Driver's license location:

Military service: Yes No

Details:

Adoption certificate: Yes No

Location of adoption certificate:

Religion

List religion:

Naturalization papers: Yes No

Location of papers:

Details:

Prior marriages: Yes No

List date(s) and name(s) of prior marriages:

Divorce, death, or annulment of prior marriages: Yes No

List dates and details:

Divorce judgment, decree, or stipulation agreement: Yes No

Location of document(s):

Details:

Child support payments: Yes No

Location of document(s):

Details:

Alimony settlement payments: Yes No

Location of document(s):

Details:

Property settlement: Yes No

Location of document(s):

Details:

Qualified domestic relations order (QDRO): Yes No

Location of document:

Details:

General power of attorney (finances): Yes No

Contact information:

Location of document:

Details:

Copies of power of attorney (finances): Yes No

Location of copies:

Details:

9 | Usernames, Passwords & Pin Numbers

Digital assets may be important to access in order to retrieve information, secure your data, or to turn off your accounts. Without the benefit of your usernames and passwords, this becomes a very complex and difficult task for your loved ones.

To my loved ones:

Yes
I have filled out this section and would like you to review it.

No
I have not provided information as this section is not relevant to me.

Smartphone: Yes No

Username:

Password:

Pin:

Blackberry: Yes No

Username:

Password:

Pin:

Home computer: Yes No

Username:

Password:

Pin:

iPad(s)/tablets: Yes No

Username:

Password:

Pin:

CHAPTER 1: IMMEDIATE MATTERS

Office computer: Yes No

Username:

Password:

Pin:

Storage devices: Yes No

List:

Username:

Password:

Pin:

List:

Username:

Password:

Pin:

Kindle / Nook / other: Yes No

List:

Username:

Password:

Pin:

Other digital assets: Yes No

List:

Username:

Password:

Pin:

List:

Username:

Password:

Pin:

10 | Funeral & Memorial Services

Many people wonder what the difference is between a funeral and a memorial service. While there are no strict rules and your life should be celebrated in whatever way you choose, traditionally funerals take place with the body or the ashes of the deceased person present. Memorial services are ceremonies without the presence of the body, although an urn containing the ashes may be present. Funerals are usually held immediately following death whereas memorial services may take place weeks or months afterwards. Whatever kind of service you choose, helping your loved ones create a service that honors your life is a true gift to the living.

To my loved ones:

Yes

I have filled out this section and would like you to review it.

No

I have not provided information as this section is not relevant to me.

Funeral service

I want to have a funeral service:

Yes No No preference (my loved ones may decide on my behalf)

I have planned my funeral service and the information is located:

Clergy/officiant/celebrant:

Contact information:

Funeral home:

Contact information:

Funeral director:

Contact Information:

Funeral service details

I have made preplanned/prepaid funeral arrangements: Yes No

Location of documents:

Details:

I want to have a religious service: Yes No

Details:

I want to have a military service: Yes No

Details:

I want to have a viewing: Yes No

Details:

I want to have a wake: Yes No

Details:

I want to have calling hours: Yes No

Details:

I want to have the following special requests:

I want to have my body present: Yes No

Details:

I want to have an open casket: Yes No

Details:

I want to have a closed casket: Yes No

Details:

Participants (include contact information):

Ushers (include contact information):

CHAPTER 1: IMMEDIATE MATTERS

Pallbearers (include contact information):

Speaker(s) chosen for my eulogy (include contact information):

Person(s) chosen to read at my funeral service (include contact information):

I want to have specific scripture or literature read: Yes No

Details:

Favorite music and hymns:

I want to have a soloist sing: Yes No

Contact information:

I want to have musicians perform: Yes No

Contact information:

I want to have a videographer: Yes No

Contact information:

I want to have flowers: Yes No

Contact information:

Favorite flowers:

I have selected photographs for my service: Yes No

Location of photographs:

Details:

I have selected acknowledgment cards/words of expression: Yes No

Location of acknowledgment cards/words of expression:

Details:

I want to have an online guest book: Yes No

I have selected a sign-in book: Yes No

Location of sign-in book:

CHAPTER 1: IMMEDIATE MATTERS

I want to have a graveside ceremony: Yes No

Details:

I want to have a reception after to celebrate my life: Yes No

Location of reception (include contact information):

Details:

I want to invite the public to the reception: Yes No

I have made a list of invitees to the reception: Yes No

Location of list:

I have not made a list and only want to invite the following people to the reception (list names and contact information):

Transportation to service (include contact information):

Local hotels for family and guests (include location and contact information):

Additional information:

Memorial service

I want to have a memorial service:

Yes No No preference (my loved ones may decide on my behalf)

I have planned my memorial service and the information is located:

Clergy/officiant/celebrant:

Contact information:

Memorial service details

I have made preplanned/prepaid memorial service arrangements: Yes No

Location of documents:

Details:

I want to have a religious service: Yes No

Details:

I want to have a military service: Yes No

Details:

Participants (include contact information):

Ushers (include contact information):

Speaker(s) chosen for my eulogy (include contact information):

Person(s) chosen to read at my memorial service (include contact information):

I want to have specific scripture or literature read: Yes No

Details:

Favorite music and hymns:

I want to have a soloist sing: Yes No

Contact information:

I want to have musicians perform: Yes No

Contact information:

CHAPTER 1: IMMEDIATE MATTERS

I want to have a videographer: Yes No

Contact information:

I want to have flowers: Yes No

Contact information:

Favorite flowers:

I have selected photographs for my service: Yes No

Location of photographs:

Details:

I have selected acknowledgment cards/words of expression: Yes No

Location of acknowledgment cards/words of expression:

Details:

I want to have an online guest book: Yes No

I have selected a sign-in book: Yes No

Location of sign-in book:

I want to have a reception after to celebrate my life: Yes No

Location of reception (include contact information):

Details:

I want to invite the public to the reception: Yes No

I have made a list of invitees to the reception: Yes No

Location of list:

I have not made a list and only want to invite the following people to the reception (list names and contact information):

Transportation to service (include contact information):

Local hotels for family and guests (include location and contact information):

Additional information:

CHAPTER 2

FINANCIAL MATTERS

*“The secret of getting ahead
is getting started.”*

-MARK TWAIN

Instructions for loved ones to help find, manage, secure and/or resolve your finances.

Even if others have always handled your family's finances, your loved ones may be overwhelmed by the number of financial matters they will have to settle in the weeks or months following your death.

This chapter will help walk you through the various aspects of your financial affairs that you will need to get in order.

In this chapter:

- 1 Bank Accounts
- 2 Brokerage Accounts
- 3 Safe Deposit Box
- 4 Business Ownership
- 5 Insurance
- 6 Retirement Plans
- 7 Social Security/Pension/
Government Benefits
- 8 Debt
- 9 Other Sources of Income/
Financial Assets
- 10 Promissory Notes/Royalties/
Annuity Contracts
- 11 Assets Held in Another
State or Country

Helpful information for your loved ones:

- ✓ Many financial institutions, government agencies, creditors, unions, membership groups and other organizations won't even talk to your loved ones about your financial affairs let alone take action, like closing an account, until they produce a death certificate.
- ✓ The first order of business for your loved ones is to go to the city clerk's office or your local vital statistics office and get certified copies of the death certificate. They will need this valuable document before starting to contact banks, investment companies and other firms.
- ✓ Obtain at least 10 copies of the death certificate; 20 copies would be even better.

1 Bank Accounts

To my loved ones:

Yes
I have filled out this section and would like you to review it.

No
I have not provided information as this section is not relevant to me.

Certificates of deposit

Yes No

List accounts, contact information and location of documents:

Savings accounts

Yes No

List accounts, contact information and location of documents:

Checking accounts

Yes No

List accounts, contact information and location of documents:

Passbook accounts

Yes No

List accounts, contact information and location of documents:

2 | Brokerage Accounts

To my loved ones:

Yes

I have filled out this section and would like you to review it.

No

I have not provided information as this section is not relevant to me.

Financial advisor/planner

Yes No

Contact information:

Brokerage accounts

Yes No

List accounts, contact information and location of statements:

Money market accounts

Yes No

List accounts and location of documents:

Online access accounts

Yes No

List accounts and location of statements:

Debit card accounts

Yes No

List accounts and location of statements:

Treasury bills

Yes No

List accounts and location of statements:

Treasury bonds

Yes No

List accounts and location of statements:

Municipal bonds

Yes No

List accounts and location of statements:

Corporate bonds

Yes No

List accounts and location of documents:

Series E bonds

Yes No

List accounts and location of statements:

Escrow mortgage accounts

Yes No

List accounts and location of statements:

E-trade accounts

Yes No

List accounts and location of statements:

CHAPTER 4

PERSONAL PROPERTY MATTERS

*“The ability to simplify means to
eliminate the unnecessary so that
the necessary may speak.”*

- HANS HOFMANN


Instructions for loved ones on how to find, distribute, care for, or maintain your personal property.

Your personal belongings often mean a great deal not only to you, but to those who are left behind after your death. Even the smallest items can become meaningful keepsakes to friends and loved ones. Your loved ones should contact your attorney prior to distributing any property in order to make sure that your estate is handled properly.

This chapter will help prompt you to think about all the various items in your possession that may need to be distributed, cared for, stored, donated or disposed of upon your death.

In this chapter:

- 1 Computers and Electronics
- 2 Jewelry
- 3 Photos, Film, Movies, Slides and Audio tapes
- 4 Vehicles
- 5 Club Memberships
- 6 Tools
- 7 Cameras
- 8 Instruments
- 9 Recreational/Fitness
- 10 Art
- 11 Home Safe
- 12 Bikes
- 13 Collections
- 14 Wine
- 15 Guns/Weapons
- 16 Frequent Flyer Mileage Accounts
- 17 Storage Units
- 18 Unpublished Works/Written Drafts/Notes
- 19 Boats
- 20 Airplanes



Helpful information to think about before you begin:

- ✓ Get family members and friends to help distribute your personal belongings by asking them what they would like after your death
- ✓ Pass out stickers to your friends and family, and have them put their names on the back of the items they choose
- ✓ Make a distribution list to avoid potential family disagreements
- ✓ Consider distributing items while you are still living
- ✓ Make arrangements for a charitable donation of belongings that aren't designated to a family member

1 Computers and Electronics

To my loved ones:

Yes
I have filled out this section and would like you to review it.

No
I have not provided information as this section is not relevant to me.

Computers and laptops

Yes No

List and location of computers:

iPhone/BlackBerry/cell phone

Yes No

List and location of smartphone(s):

iPads/tablets

Yes No

List and location of iPads/tablets:

iPod/mp3 player(s)

Yes No

List and location of iPod/mp3 player(s):

Printers/scanners/peripherals

Yes No

List and location of equipment:

Televisions and DVRs

Yes No

List and location of television(s):

Servers

Yes No

List and location of server(s):

Speakers, stereos, music systems

Yes No

List and location of equipment:

I wish to transfer computers and electronics upon my death as follows:

Details and contact information:

2 Jewelry

To my loved ones:

Yes
I have filled out this section and would like you to review it.

No
I have not provided information as this section is not relevant to me.

Watch(es)

Yes No

Location of watch(es):

Insured jewelry

Yes No

Location of jewelry:

Location of insurance documents:

Wedding ring(s)

Yes No

Location of wedding ring(s):

Non-insured jewelry

Yes No

Location of non-insured jewelry:

I have a jewelry distribution list

Yes No

Location of distribution list:

I have jewelry appraisals

Yes No

Location of jewelry appraisals:

I wish to transfer jewelry upon my death as follows:

Details and contact information:

CHAPTER 5

PRIVATE MATTERS

*“Genius is the ability
to put into effect what
is on your mind.”*

- F. SCOTT FITZGERALD


Instructions for loved ones about personal, sentimental, private and family matters.

No two people and no two families are alike, and there is clearly no “one size fits all” solution to communicating what matters to you.

This chapter is designed to help you think about the kinds of things you normally don't have to (or choose to) talk about. It's designed to help you communicate about private matters and help loved ones understand the personal places, items and traditions that have been important to you.

In this chapter:

- 1 : Digital Accounts
- 2 : Bucket List
- 3 : Genealogy
- 4 : Family and Holiday Traditions
- 5 : Hidden Assets and Documents
- 6 : History and/or Photos of Inherited Pieces
- 7 : Post Office Boxes and Items Stored Elsewhere
- 8 : Other Unusual Documents
- 9 : Personal Diary
- 10 : Private Letters/Notes
- 11 : Secrets



Helpful information to think about before you begin:

- ✓ Gather a list of your most frequently visited online sites (your browser history will help!)
- ✓ Brainstorm a list of all the traditions that have meant something to your family
- ✓ Make a list of all the places things may be “stored” (Boxes? Attics? Dresser drawers? Safe deposit box? Storage lockers?)
- ✓ Gather together all the keys you have. Is it clear what each one belongs to? Label them.

1 Digital Accounts

To my loved ones:

Yes
I have filled out this section and would like you to review it.

No
I have not provided information as this section is not relevant to me.

Financial

ATM Yes No

Username:

Password:

Online banking Yes No

Name of institution:

Username:

Password:

Financial accts online Yes No

Name of institution:

Username:

Password:

E-trade Yes No

Username:

Password:

Mint.com Yes No

Username:

Password:

Online storage Yes No

Username:

Password:

Paypal Yes No

Username:

Password:

Other:

Username:

Password:

Other:

Username:

Password:

Phones

iPhone Yes No

Password:

Android Yes No

Password:

Home phone Yes No

Password:

Smartphone Yes No

Password:

Other:

Password:

Professional

Work computer Yes No

Username:

Password:

Work apps Yes No

Name of app:

Username:

Password:

iCloud Yes No

Username:

Password:

Gmail Yes No

Username:

Password:

Hotmail Yes No

Username:

Password:

Yahoo! Yes No

Username:

Password:

LinkedIn Yes No

Username:

Password:

Evernote Yes No

Username:

Password:

Blogs Yes No

URL:

Username:

Password:

CHAPTER 5: PRIVATE MATTERS

DNS services Yes No

Service name:

Username:

Password:

Domains Yes No

Domain registrar:

Username:

Password:

File sharing Yes No

Service name:

Username:

Password:

Software licenses Yes No

Service name:

Username:

Password:

Tax preparation Yes No

Service name:

Username:

Password:

Web hosting Yes No

Service name:

Username:

Password:

Other Yes No

Service name:

Username:

Password:

URL(s) Yes No

URL address: Username: Password:

URL address: Username: Password:

URL address: Username: Password:

URL address: Username: Password:

Photo sharing

Instagram Yes No Username: Password:

Flickr Yes No Username: Password:

Photobucket Yes No Username: Password:

Tinypic Yes No Username: Password:

Shutterfly Yes No Username: Password:

Snapfish Yes No Username: Password:

Fotki Yes No Username: Password:

Picassa Albums Yes No Username: Password:

Other: Username: Password:

Other: Username: Password:

Other: Username: Password:

Social

| | | | |
|------------|--|-----------|-----------|
| Facebook | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Twitter | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| LinkedIn | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Google + | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Pinterest | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| YouTube | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Tumblr | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| VK | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Instagram | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| MySpace | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| FourSquare | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Reddit | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Tagged | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| MeetMe | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| MeetUp | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Classmates | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Skype | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| iTunes | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |

Dating sites

| | | | |
|------------------|--|-----------|-----------|
| Zoosk | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Match.com | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| eHarmony | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| OurTime | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Christian Mingle | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |

Other sites

| | | | |
|-----------------|--|-----------|-----------|
| AARP | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Ancestry | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Dropbox | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| FamilyTreeMaker | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Plaxo | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Other: | | Username: | Password: |
| Other: | | Username: | Password: |
| Other: | | Username: | Password: |
| Other: | | Username: | Password: |
| Other: | | Username: | Password: |
| Other: | | Username: | Password: |
| Other: | | Username: | Password: |

On-line shopping

| | | | |
|----------------|--|-----------|-----------|
| Amazon | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Apple | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Barnes & Noble | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Best Buy | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Ebay | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Etsy | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Groupon | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Home Depot | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Ikea | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Overstock | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Target | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Walmart | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Zappos | <input type="radio"/> Yes <input type="radio"/> No | Username: | Password: |
| Other: | | Username: | Password: |
| Other: | | Username: | Password: |
| Other: | | Username: | Password: |
| Other: | | Username: | Password: |
| Other: | | Username: | Password: |

Hotel Accounts

Hotel name:

Account number:

Details:

Hotel name:

Account number:

Details:

Hotel name:

Account number:

Details:

Hotel name:

Account number:

Details:

Rental cars

Rental car service name:

Account number:

Details:

Rental car service name:

Account number:

Details:

Rental car service name:

Account number:

Details:

Rental car service name:

Account number:

Details:

4 | Family and Holiday Traditions

To my loved ones:

Yes

I have filled out this section and would like you to review it.

No

I have not provided information as this section is not relevant to me.

Details:

Location of documents or other paperwork:

5 Hidden Assets and Documents

To my loved ones:

Yes

I have filled out this section and would like you to review it.

No

I have not provided information as this section is not relevant to me.

Details:

Location of documents or other paperwork:

“Deliberately preparing for the end of life is one of the kindest things you can do for your family, your friends, and yourself. With clarity and compassion, Barb Sedoric has written an indispensable guide to making your intentions known.” *–Virginia Prescott, Host of NHPR’s “Word of Mouth”*

Death is inevitable and everyone dies. Yet it is extraordinarily difficult to face and to discuss with loved ones. At the same time, planning for your death is an absolute necessity to save grieving family members and friends from chaos and confusion during an emotionally challenging time.

But where do you begin? Planning for your death is not just difficult because we want to avoid the topic at all costs. It is also daunting because of the sheer amount of vital information that needs to be sorted through and clarified.

What do you need to think about? Who do you need to tell? And how can you make your wishes crystal clear?

The LastingMatters™ Organizer makes planning for your death and communicating your wishes easy. It is a straightforward guide that walks you through everything from what to do with your belongings to how you want your life celebrated. It will save time and money, reduce stress and guesswork, minimize family arguments and provide clear instructions to those you leave behind.

The LastingMatters™ Organizer is a profound gift that you can give yourself and also give to those you love. It will help your family and friends find what matters most to you, while helping all of you find true peace of mind.



Barbara Bates Sedoric, President and Founder of LastingMatters, is a Phi Beta Kappa graduate of Connecticut College and a former estates and trusts paralegal. Barb most recently served as a trustee of Miss Porter’s School. Barb’s personal experience following her mother’s sudden death was the inspiration behind LastingMatters™. Barb’s husband, Tom, is a nationally recognized wealth manager (thesedoricgroup.com) who has helped hundreds of families with countless life transitions, and was instrumental in the inception of LastingMatters. Barb and Tom live in Rye, New Hampshire, and have three children.

WWW.LASTINGMATTERS.COM

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