



WINNACLE·WEALTH™

Legacy Organizer

Everything my family will need to know, in one place.

PREPARED BY

LAST UPDATED

CONFIDENTIAL

This document contains passwords and sensitive personal information.
Keep it somewhere secure and tell your executor where to find it.

Elevating What Matters. Simplifying the Rest.™

Before You Begin

One of the most meaningful things you can do for the people you love is make a hard time a little simpler. When someone passes away or becomes unable to manage their affairs, families often spend months hunting for accounts, passwords, policies, and paperwork, usually while grieving.

This organizer puts it all in one place. Fill in what applies to you, skip what doesn't, and come back to it once a year. It doesn't need to be perfect to be enormously helpful.

How to Use This Organizer

Filling It In

- Type directly into the fields on your computer, or print it and write by hand. Both work.
- Leave blank anything that doesn't apply. Extra rows are provided throughout.
- Start with the sections your family would need first: Key People, Financial Accounts, and Digital Life.
- Update it whenever something changes (a new account, a new password, a new beneficiary) and at least once a year. Use the Review Log at the end.

Keeping It Safe (Please Read)

- This document can hold passwords, PINs, and account details. Anyone who holds it can reach your accounts.
- Best practice: print the completed organizer, then delete the digital copy. Store the printed copy in a fireproof safe, a safe deposit box, or with your estate attorney.
- If you keep a digital copy, password-protect the PDF (in Adobe Acrobat: File > Protect Using Password) and store it on an encrypted drive, never in email or an unprotected cloud folder.
- Never email this document, and never send it to anyone who asks for it by phone, text, or email.
- Winnacle Wealth will never ask you for your passwords or for a copy of this organizer.
- Tip: if you use a password manager, you only need to record its master password here. Your family can find everything else inside it.

Where This Organizer Is Kept

LOCATION OF THE ORIGINAL

COPIES (IF ANY) KEPT AT

PEOPLE WHO KNOW WHERE IT IS

THEIR PHONE NUMBER(S)

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Section 01

About Me

The basics your family, executor, and the funeral home will be asked for. Much of this is needed to complete a death certificate and to claim benefits.

Personal Information

FULL LEGAL NAME

DATE OF BIRTH

OTHER NAMES USED (MAIDEN, PREVIOUS)

PLACE OF BIRTH (CITY, STATE)

HOME ADDRESS

PHONE

EMAIL

SOCIAL SECURITY NUMBER

DRIVER'S LICENSE # / STATE

MEDICARE NUMBER

PASSPORT # / LOCATION OF PASSPORT

MARITAL STATUS

SPOUSE / PARTNER'S FULL NAME

DATE OF MARRIAGE

MILITARY SERVICE: BRANCH & DATES

LOCATION OF DISCHARGE PAPERS (DD-214)

FATHER'S FULL NAME

MOTHER'S FULL NAME (INCL. MAIDEN NAME)

CURRENT / LAST EMPLOYER

RELIGIOUS AFFILIATION / PLACE OF WORSHIP

Family

Children, grandchildren, siblings, and anyone else your family should be able to reach.

NAME	RELATIONSHIP	PHONE	EMAIL / ADDRESS

Key People & Legal Roles

Who you've named in your estate documents. Confirm these match your will, trust, and powers of attorney.

ROLE	NAME	PHONE	EMAIL
Executor / personal representative			
Successor executor			
Trustee			
Successor trustee			
Financial power of attorney			
Medical power of attorney			
Guardian for minor children			
Other			

Section 02

My Professional Team

The professionals who know your situation. Your family should call them early; they can save weeks of guesswork.

ROLE	NAME / FIRM	PHONE	EMAIL
Financial advisor			
Estate attorney			
CPA / tax preparer			
Insurance agent			
Banker			
Primary physician			
Clergy / spiritual advisor			
Business partner			
Other			
Other			

Winnacle Wealth

- Phone: (254) 776-8400
- Office: 200 W State Hwy 6, Suite 330, Waco, TX 76712
- If you are a client, your family can call us first. We'll help them understand your accounts, coordinate with your attorney and CPA, and guide beneficiary claims and account transfers.

Section 03

Important Documents

Where the originals are kept. Be specific: "blue folder, top drawer of the office filing cabinet" is far more helpful than "at home."

DOCUMENT	LOCATION	NOTES
Will		
Trust agreement		
Financial power of attorney		
Medical power of attorney		
Advance directive / living will		
HIPAA authorization		
Birth certificate		
Marriage certificate / divorce decree		
Prenuptial / postnuptial agreement		
Social Security card		
Military discharge (DD-214)		
Property deeds		
Vehicle titles		
Tax returns (last 3 years)		
Life insurance policies		
Other insurance policies		
Cemetery deed / prepaid funeral contract		
Business agreements		
Other		

Safe Deposit Box & Home Safe

SAFE DEPOSIT BOX: BANK & BRANCH

BOX NUMBER

KEY LOCATION

AUTHORIZED SIGNERS ON THE BOX

HOME SAFE LOCATION

SAFE COMBINATION / KEY LOCATION

Section 04

Financial Accounts

List every account, even small or inactive ones. Unclaimed accounts are often lost for good. For security, record only the last 4 digits of account numbers.

Bank & Credit Union Accounts

Checking, savings, CDs, money market.

INSTITUTION	TYPE	LAST 4	JOINT OWNER / BENEFICIARY	ONLINE USERNAME	PASSWORD

Investment & Retirement Accounts

IRAs, Roth IRAs, 401(k)/403(b), brokerage, HSAs, 529 plans.

INSTITUTION	ACCOUNT TYPE	LAST 4	BENEFICIARY	ONLINE USERNAME	PASSWORD

Pensions, Annuities & Social Security

SOURCE / COMPANY	CONTRACT OR ID #	MONTHLY AMOUNT	SURVIVOR BENEFIT?	CONTACT PHONE

Life, Long-Term Care & Other Insurance

Include employer group life, accidental death, and any policies through credit cards or associations.

COMPANY	POLICY TYPE	POLICY #	FACE AMOUNT	BENEFICIARY	AGENT / PHONE

Credit Cards

ISSUER	LAST 4	AUTOPAY FROM	ONLINE USERNAME	PASSWORD



Loans & Other Debts

Mortgage, HELOC, auto loans, personal loans, money you've borrowed from family.

LENDER	TYPE	LAST 4	AUTOPAY FROM	USERNAME / PASSWORD

Other Assets

BUSINESS INTERESTS, MONEY OWED TO YOU, PRIVATE INVESTMENTS, PRECIOUS METALS, COLLECTIBLES

Section 05

Digital Life

Without passwords, even a spouse can be locked out of a phone, email, or photos for months. Your email and phone are the keys to everything else, so start there.

Password Manager

If you use one (1Password, Bitwarden, LastPass, Apple Passwords, etc.), this may be the only password your family truly needs.

PASSWORD MANAGER APP

ACCOUNT EMAIL / USERNAME

MASTER PASSWORD

EMERGENCY ACCESS CONTACT

WHERE THE RECOVERY KIT / SECRET KEY IS STORED

Devices & Access Codes

DEVICE / SYSTEM	PASSCODE / PIN / PASSWORD	NOTES
Mobile phone		
Tablet		
Computer / laptop		
Home Wi-Fi		
Home alarm system		
Garage / gate code		
Door keypad / smart lock		
Other		
Other		

Email Accounts

Most other accounts can be reset through email, so this is the most important section.

EMAIL ADDRESS	PASSWORD	RECOVERY PHONE / EMAIL	2-STEP METHOD

Phone Carrier & Cloud Accounts

ACCOUNT	USERNAME	PASSWORD	NOTES
Mobile carrier (AT&T, Verizon, etc.)			
Apple ID / iCloud			
Google account			
Microsoft account			
Amazon			
Other			

Digital Legacy Settings

Major platforms let you name someone who can access or manage your account after you die. Check any you've set up.

☐ Apple Legacy Contact
 ☐ Google Inactive Account Manager
 ☐ Facebook legacy contact

Other Online Accounts

Shopping, travel, utilities, government (SSA, IRS, Medicare), health portals, loyalty programs.

WEBSITE / SERVICE	USERNAME	PASSWORD	SECURITY QS / 2-STEP NOTES

Social Media

Tell your family whether you'd like each account memorialized, deleted, or left as is.

PLATFORM	USERNAME	PASSWORD	MY WISHES
Facebook			
Instagram			
LinkedIn			
X / Twitter			
Other			



Subscriptions & Automatic Payments

Streaming, memberships, software, subscription boxes, charitable pledges.

SERVICE	APPROX. COST	PAID WITH	CANCEL OR TRANSFER?

Cryptocurrency & Digital Assets

Without the recovery phrase, crypto can be permanently lost. Record where it is stored.

EXCHANGE / WALLET	WALLET TYPE	USERNAME	PASSWORD	RECOVERY PHRASE LOCATION

Section 06

Home & Household

What your family will need to keep the household running and to wind things down smoothly.

Real Estate

Primary home, vacation property, land, rental property.

PROPERTY ADDRESS	OWNERSHIP (JOINT, TRUST)	MORTGAGE LENDER	DEED LOCATION

Vehicles

Cars, trucks, boats, RVs, trailers.

YEAR / MAKE / MODEL	TITLE LOCATION	LENDER (IF ANY)	SPARE KEY LOCATION

Utilities & Recurring Bills

COMPANY	SERVICE	LAST 4 / ACCT	AUTOPAY FROM	USERNAME / PASSWORD

Other Things to Know About

ITEM	LOCATION / DETAILS	ACCESS (KEY, CODE, CONTACT)
Storage unit		
P.O. box		
Spare house keys		
Frequent flyer / loyalty points		
Collectibles / valuables		
Other		

HOUSEHOLD INSTRUCTIONS (MAINTENANCE, SERVICE PROVIDERS, ANYTHING UNUSUAL ABOUT THE HOUSE)

Section 07

Personal Wishes

Sharing your wishes spares your family from guessing during a difficult time. Note: wishes written here are not legally binding. Make sure important ones are also reflected in your will or other legal documents.

Funeral & Burial

PREFERENCE

☐ Burial
 ☐ Cremation
 ☐ Green burial
 ☐ Donate body to science
 ☐ No preference

ORGAN & TISSUE DONOR

☐ Yes
 ☐ No
 ☐ Registered on driver's license

PREFERRED FUNERAL HOME

PREPAID PLAN? CONTRACT # / LOCATION

CEMETERY / BURIAL PLOT LOCATION

WHERE ASHES SHOULD GO (IF CREMATED)

SERVICE WISHES: TYPE OF SERVICE, LOCATION, MUSIC, READINGS, WHO SHOULD SPEAK

OBITUARY NOTES: DETAILS YOU'D LIKE INCLUDED, PREFERRED PHOTO, MEMORIAL GIFTS IN LIEU OF FLOWERS

People to Notify

Friends, former colleagues, clubs, and organizations your family might not think of.

NAME	RELATIONSHIP	PHONE / EMAIL

Pets

NAME / TYPE	VETERINARIAN	CARE INSTRUCTIONS	WHO WILL CARE FOR THEM

Personal Items

Sentimental items and who you'd like to have them. Coordinate with your will.

ITEM	INTENDED FOR	LOCATION

Section 08

A Note to My Family

Space for anything you'd like your loved ones to know: gratitude, memories, advice, or simply where to start.

Section 09

For My Family: First Steps

If you're reading this, we're sorry for your loss. Here's a general roadmap. You don't need to do everything at once, and you don't need to do it alone. This is general guidance, not legal advice; your estate attorney can tell you what applies.

In the First Few Days

- ☐ Obtain a legal pronouncement of death (from hospice, the hospital, or a physician).
- ☐ Notify close family and friends. Ask someone to help make calls.
- ☐ Contact the funeral home. Check the Personal Wishes section and the Important Documents section for any prepaid arrangements.
- ☐ Secure the home, vehicles, and valuables. Arrange care for pets.
- ☐ Locate the will and this organizer. Don't distribute any assets yet.
- ☐ Order certified copies of the death certificate (usually through the funeral home). Many families need 10 or more.

In the First Few Weeks

- ☐ Contact the estate attorney and the named executor to begin the estate process.
- ☐ Call the financial advisor. Winnacle Wealth clients: (254) 776-8400.
- ☐ Notify Social Security (the funeral home often does this; you can also call 1-800-772-1213). Ask about survivor benefits.
- ☐ Contact life insurance companies and any pension or annuity providers to begin claims.
- ☐ Notify banks, credit card companies, and lenders. Don't close joint accounts until you've spoken with the attorney.
- ☐ Notify the employer or former employer about final pay, benefits, and group life insurance.
- ☐ Contact the Department of Veterans Affairs if applicable (burial and survivor benefits).
- ☐ Place a deceased alert with the credit bureaus (Equifax, Experian, TransUnion) to prevent identity theft.
- ☐ Forward mail with the U.S. Postal Service and keep paying essential bills.

In the Months Ahead

- ☐ Work with the executor and attorney to inventory assets and settle debts.
- ☐ Work with the CPA to file final income tax returns and any estate tax returns.
- ☐ Retitle or transfer property, vehicles, and accounts as directed.
- ☐ Cancel subscriptions and memberships. Close, memorialize, or preserve digital accounts per the wishes in this organizer.
- ☐ Update your own estate documents, beneficiaries, and insurance to reflect the changes.



Section 10

Review Log

Review this organizer at least once a year and after major life events: marriage, divorce, a birth or death in the family, a move, new accounts, or new passwords.

DATE	WHAT CHANGED	INITIALS

Important Disclosures

Winnacle Wealth, LLC is a Registered Investment Advisor located in Texas providing investment advisory and related services nationally. This organizer is provided for personal record-keeping only and does not constitute legal, tax, or estate-planning advice. It is not a substitute for a will or other legal documents. Winnacle Wealth does not request, receive, or retain a copy of your completed organizer.