Leaving a Simple Legacy

Make sure you've dealt with key paperwork as discussed in other sessions - power of attorney, healthcare advocate, funeral representative, executor of estate

The Stuff

- **Sentimental items** - Ask your kids! Organize and label photos with names, not "Dad"
- **Clutter** - Get rid of what you can, sort the rest
- **Personal / private items** - Gather and label items that you want to keep but that aren't necessarily for everyone's review, such as private letters etc.
- **Access** - Make sure someone has keys! How will bills be paid?

The People

- **Kids, parents, pets** - Talk with those you hope will take on the work, make sure the legal stuff is in place
- **Conversations** - Apologies, clarifications, right relationship

The Administration

- **Finances** - Simplify where you can, list out what accounts you have, make sure beneficiary designations match your estate planning
- **Passwords** - A notebook in a known location or a password manager with settings in place so passwords can be accessed
- **Digital legacy** - Any specific wishes for your accounts? Can you curate photos?
- **Notifications** - have a designated person to launch the phone tree. List people to contact - professionals, friends, organizations.

The Memorial

- **Final disposition** - Burial, cremation, something else? Where should you be buried? If cremated, what should be done with your cremated remains?
- **Funeral / memorial services** - Music, printouts, catering, location. Who do they contact to organize?
- **Obituary** - Gathering basic facts you want included is helpful!