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Creating a When I Die file

By Mary Ungoed-Thomas

Though it may sound morbid, creating a file with instructions for your loved ones on your death can save your relatives time, hassle and money. Without guidance, sorting out your affairs may be stressful for grieving family members and could take months or even years to complete. You can consider such a file to be a loving and helpful guidebook for those you leave behind.

It is recommended that the following be included in a When I Die file:

- Your will.
- Birth certificates, marriage certificates, divorce certificates and death certificates.
- Property deeds, information about mortgages, pensions and tax information.
- Driver's licence and social security card.
- Details of financial accounts, credit cards, membership fees, loans and insurance policies including passwords and statements (consider making your trusted individual joint account owner for ongoing services).
- Information about your lawyer, accountant, and any advisers.
- Your digital legacy: access to your computer, personal website, social media accounts and email.
- A signed advanced directive stating health decisions that should be taken if you are incapacitated.
- Power of attorney for finance stating financial decisions that should be taken if you are incapacitated.
- Funeral instructions including whether you prefer burial or cremation, and what type of service you would like.
- Sentimental items such as letters to loved ones.
- An ethical will, which details who will inherit meaningful personal possessions such as books and photos.
- Contact details for people who you would like notified that you have passed away.

Your file could take the form of a binder, cloud-based drive, documents in a safety deposit box/safe, or even a shoebox. Tell your trusted individual where they can find everything, and consider using an online password manager – giving the master code to your favoured person.

You could download a free 'When I die' template to help you compile a file. Make sure you keep your file up-to-date and review it regularly.

Useful websites

The Browne Firm

In Case of Death Template

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Translation disclaimer: Content originally written in English.