

Personal Continuity Inventory

A map of the information someone would need if you could not manage your own affairs

Educational planning resource - not legal, tax, financial, or medical advice. Laws and terminology vary by state. Use this guide to organize your thinking and bring informed questions to qualified professionals.

A. Identity & Immediate Contacts

Full legal name

Preferred name

Date of birth

Home address

Primary phone

Primary personal email

Primary emergency contact

Attorney / law firm

B. Medical

Health insurance / Medicare information

Primary doctor or most-used physician

Specialists

Medication list location

Health Care Proxy location

Living Will / directive location

Preferred hospital / health system

C. Home & Housing

Residence type / ownership

Mortgage or rent servicer

Building / HOA / co-op contact

Utilities

Who has a key / access method

Home insurance

Pet care instructions

D. Banking & Cash Flow

Primary checking institution

Secondary checking / savings

Primary credit card

Regular income sources

Major recurring expenses

Automatic payments

Where statements are stored

E. Investments & Retirement

Brokerage accounts

Traditional retirement accounts

Roth accounts

Pensions / annuities

Beneficiary records location

Investment-management approach

F. Taxes & Recordkeeping

Who prepares taxes

Tax software / accountant

Location of recent returns

Business tax records

Estimated tax schedule

Basis / property-improvement records

G. Digital Access

Password manager

Emergency-access status

Primary email control account

Phone unlock method

MFA / authenticator method

Cloud storage

Device recovery keys location

Backup method

H. Online Accounts & Social Media

Major social media

Cloud photo / video storage

Subscriptions

Domain registrars

Websites

Streaming / creator accounts

Desired memorialize / preserve / delete instructions

I. Business / Professional

Business name and structure

Business bank

Accounting system

Client / customer roster

Key vendors

Critical systems

Backup support person / company

Continue / sell / wind-down preference

J. Insurance & Benefits

Life insurance

Disability insurance

Long-term care insurance

Health / supplemental coverage

Other policies

Policy documents location

K. Physical & Sentimental Property

Vehicles

Jewelry / valuables

Artwork

Family photographs / archives

Musical / creative equipment

Items promised to specific people

Donation / disposal preferences

L. Creative / Intellectual Property

Copyrighted works

Royalty accounts

Publishing / distribution

Masters / source files

Licensing agreements

Archival material

Who should manage decisions

Disposition / legacy wishes

M. Funeral / Remains / Memorial

Burial / cremation / other preference

Disposition agent

Funeral home / provider if selected

Religious / cultural wishes

Memorial preferences

Obituary / notification wishes

Do not store passwords here unless you intentionally choose to.

Use this inventory to point to the secure location where credentials and originals can be found.