



C O N S C I O U S
O R D E R

IF/WHEN Something Happens, Here's What I Want You To Know

A Gift to Those Who Might Need This Information

by Annie Rohrbach

Professional Organizer and Estate Organizer since 1987

If found, please return immediately to:

NAME: _____

PHONE: _____

EMAIL: _____

This is a FREE download of the Index of Workbook Forms. To purchase the full workbook, go to www.consciousorder.com.

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*NOTES: 1. Below is a comprehensive Index of all the forms for the Workbook, **IF/WHEN Something Happens, Here's What I Want You to Know**. Notice that there are often added descriptions to help you find specific information. These details are included because they may trigger something that hadn't occurred to you before, and remind you of other information you may want to provide.*

2. Forms considered "Essential" are marked with an asterisk (). Forms requiring EXTRA SECURITY are marked with a double asterisk (**). If they are both Essential and need EXTRA SECURITY, they are marked with a triple asterisk (***)*.

3. Review the entire Index to get an overview of how much information you could provide, recognizing that it might seem a bit overwhelming. However, this will help you decide:

(a) Which forms you want to complete first. You might want to circle the Form Number listed at the right (in pencil), so you can find those you want to work on with a quick glance. When you complete a Form, erase that circle and put a check mark in the space at the far left.

(b) Which forms are of no importance at all right now. In pencil, you could put an "X" in the space at the far left, next to the Name or Topic, so you don't have to review or complete that form unless your circumstances change. For example, you might not have Minor Children now, but you would then want to complete Form #13 IF/WHEN you do.

4. You could also use this Index to plan or prioritize which forms to complete, one form at a time. You could even number them, according the order in which you intend to complete them. Or prioritize them in groups, such as Priority A, B, C, etc.

5. When you have completed a form, use this Index as a Check List. Place a check mark in front of that form's Name or Topic in the space provided here. And please remember to acknowledge that you have completed it. Yay!

INDEX OF WORKBOOK FORMS

_____ ALL ABOUT ME.....***FORM #1

This form is “Essential” because it includes everything that might be needed on a Death Certificate. It could also be used for an Obituary and/or for other purposes, including family history and genealogy. *Forms #2-#6 are also very helpful.*

_____ Health InsuranceFORM #2

_____ Health Care Providers.....FORM #3

_____ Health Care Preferences.....FORM #4

_____ Current Medications & Supplements.....FORM #5

_____ Miscellaneous Medical Information.....FORM #6

_____ IF/WHEN you have a SPOUSE/PARTNER/SIGNIFICANT OTHER

_____ All About Him/Her.....***FORM #7

This form is “Essential” because it includes everything that might be needed on a Death Certificate. It could also be used for an Obituary and/or for other purposes, including family history and genealogy.

_____ His/Her Health Insurance.....FORM #8

_____ His/Her Health Care Providers.....FORM #9

_____ His/Her Health Care Preferences.....FORM #10

_____ His/Her Current Meds & Supplements.....FORM #11

_____ His/Her Miscellaneous Medical Information.....FORM #12

_____ IF/WHEN you have MINOR CHILDREN.....FORM #13

School, Care, Guardian, Carpools, Providers, Friends, Activities, Medical and Food Info, Schedules, Favorites (*Complete a separate form for each child.*)

_____ IF/WHEN you have PETS/LIVESTOCK.....FORM #14

Description, Care, Boarding, Providers, Allergies, Crating, Chips, Commands, Supplies, Routines, Exercise, Food, Favorites, Tricks, Medical Info, Insurance, Special Instructions (*Complete a separate form for each pet/herd.*)

INDEX OF WORKBOOK FORMS

_____ IF/WHEN you are a GUARDIAN or CONSERVATOR.....FORM #15

_____ IF/WHEN you have OTHER DEPENDENTS.....FORM #16
(including Adult Children, Grandchildren, Nieces, Nephews, etc.)

_____ IF/WHEN you are an EXECUTOR or TRUSTEE.....FORM #17

_____ IF/WHEN you want FAMILY, FRIENDS and NEIGHBORS NOTIFIEDFORM #18
First Priority, Key Callers, Phone Trees, Important Neighbors, Organizations, Others

_____ IF/WHEN IMPORTANT PROFESSIONALS Need to be Contacted
(FINANCIAL, LEGAL).....FORM #19
Accountant, Agents for Health Care & Financial & Legal Matters, Attorneys,
Financial & Investment Consultants (*Also see Estate Professionals & Contacts,
Form #20.*)

_____ IF/WHEN ESTATE PROFESSIONALS & DESIGNEES Need to be Contacted—
_____ Agents, Attorneys, Estate Executors, Trustees.....FORM #20
_____ Clergy, Officiant, Mortuary, Funeral Home, etc.....FORM #21
(*Also see Form #19 re other Professionals.*)

_____ IF/WHEN you want an OBITUARY.....FORM #22
Information, Photo(s), Relatives, Education, Employment, Armed Services,
Memberships, Interest, Hobbies, Achievements, Flowers/Donations, Publications,
Who writes it?

INDEX OF WORKBOOK FORMS

_____ IF/WHEN you have BURIAL Preferences.....FORM #23a
Body Disposition, Placement of Remains, Markers, Prepaid Arrangements, Contacts

_____ IF/WHEN you have MEMORIAL &/or RECEPTION Preferences.....FORM #23b
What, if any, kind of Service(s), Music, Readings, Participants, Flowers,
Reception details, Invitation List.

_____ IF/WHEN you are looking for ESSENTIAL DOCUMENTS.....*FORM #24
NOTE: This can be very helpful in locating your important papers. It is an extensive list of possibilities that could be important to you, that may remind you of documents you hadn't thought of. (Also see Form #31 for OTHER IMPORTANT DOCUMENTS.)

_____ IF/WHEN you lose your WALLET.....**FORM #25
Credit and Debit Cards, ID cards, Insurance, Membership Cards, Blood Donor,
Emergency Info. Non-wallet cards.

_____ IF/WHEN information is needed about your INCOME.....**FORM #26
Current Income (checks &/or auto-deposits), Dividends, Rental,
Loans Due, Royalties, etc.

_____ IF/WHEN help is needed to PAY YOUR BILLS.....**FORM #27
Whom would you chose? What? To Whom? How much? Where?
Debts? Tithes? Charitable Gifts? Alimony? Allowances? Bonuses?

_____ IF/WHEN you want a summary of your ASSETS, LIABILITIES
and NET WORTH.....**FORM #28

INDEX OF WORKBOOK FORMS

_____ IF/WHEN you have FINANCIAL ASSETS & ACCOUNTS.....***FORM #29
Bank & Investment Accounts, Stocks, Bonds, Retirement Accounts, Annuities,
Anticipated Inheritances, Money Owed to You, Debit & Credit Card Accounts,
Misc. (*Also see Form #25.*)

_____ IF/WHEN you have INSURANCE.....FORM #30
(*Also see Forms #2 and #8 for Health Insurance.*)

_____ IF/WHEN you want OTHER IMPORTANT PAPERS in Order.....FORM #31
An extensive list to help you decide what other papers are important, and perhaps
help you discover things you hadn't thought about, for which you might have
special instructions.

_____ IF/WHEN you are EMPLOYED.....FORM #32
Salary, Vacation & Sick Pay, Insurance, Savings Plans, Car Pools
(*Complete a separate form for each employer.*)

_____ IF/WHEN you have YOUR OWN BUSINESS.....FORM #33
Partners, Agreements, Employees, Colleagues, Clients/Patients, Insurance,
Organizations (*Complete a separate form for each business.*)

_____ IF/WHEN you own your PRIMARY RESIDENCE and/or
OTHER REAL ESTATE.....FORM #34
Address, Type, Loans, Improvements, Keys/Access, Realtor, Important Contacts, etc.
(*Complete a separate form for each property.*)

INDEX OF WORKBOOK FORMS

_____ IF/WHEN you own RENTAL PROPERTYFORM #35
Address, Type, Loans, Improvements, Keys/Access, Property Manager, Tenants,
Co-Owners, Realtor, etc. *(Complete a separate form for each property.)*

_____ IF/WHEN you own TIME SHARE(S).....FORM #36
Address, Reservations, Keys/Access, Other (Co-Owners, etc.)
(Complete a separate form for each property.)

_____ IF/WHEN you are a TENANT, RENTING Property.....FORM #37
Address, Landlord, Property Manager, Expenses, Housemates,
Important Contacts, etc.

_____ IF/WHEN you OWN or LEASE VEHICLES of any kind.....**FORM #38
Description, ID, Registration, Location, Keys/Access, Location of Records
& Pink Slip, What do with it? *(Complete a separate form for each.)*

_____ IF/WHEN you have LOCKS, KEYS, COMBINATIONS.....**FORM #39
This information is critical if you want those you trust to be able to access
properties, vehicles, furniture, equipment, lockers, safes, safe deposit &
post office boxes, etc. And what about “special hiding places!?”

_____ IF/WHEN you have ELECTRONICS.....**FORM #40
How do those you trust access your phones, computers, tablets, answering
devices and voicemails?

INDEX OF WORKBOOK FORMS

- _____ IF/WHEN you have DIGITAL ASSETS (non-financial)..... **FORM #41
Email Accounts, Social Media, Other Online Accounts, Photos, Websites,
Seller Accounts, also known as your “virtual life.”
(Also see #29 for Financial Digital Assets.)
- _____ IF/WHEN you have COMMITMENTS & PLANS.....FORM #42
Appointments, Work, Child Care, Volunteer Meetings, Classes, Lessons,
Travel Plans, Tickets for Sports and Entertainment
- _____ IF/WHEN you have PERSONAL PROPERTYFORM #43
List your most treasured Possessions, Bequests, Instructions, Special Gifts to
Friends, Charities, Who oversee?
- _____ IF/WHEN you have special PHOTOS & MEMORABILIA.....FORM #44
Where are they now? Where do they go? Organize them?
- _____ IF/WHEN you have to EVACUATE.....FORM #45
Emergency, Hospital, Extended Absence, Protecting Valuables
- _____ IF/WHEN you have to move to ASSISTED LIVING.....FORM #46
Highest Priorities, Furnishings? Who help?
- _____ IF/WHEN there is OTHER PERSONAL INFORMATION.....FORM #47
An extensive list to help you decide what is important and what is not; what to create,
ponder, find and/or destroy.

_____ Extra Page, IF/WHEN you want to add MORE INFO/NOTES.....Last Page

_____ IF/WHEN you want to order more copies of this WORKBOOK and its 47 FORMS,
go to www.consciousorder.com.

Please tell others about it. Think of everyone who could use this.

Thank you!

_____ IF/WHEN you want to order copies of Annie's classic organizing book,
Conscious Order: Clear Your Mind, Leave Clutter Behind,
go to www.consciousorder.com.

Thank you so much!