



AnnCare Companion Planner

*Helping families navigate the
paperwork after loss.*

www.anncare.io

When someone passes, time slows down, but the world doesn't stop. Mail keeps arriving. Bills keep running. Everything moves forward before you've had a chance to process. If you've lived through it, you know how overwhelming the forms, the phone calls, and the constant search for information can be.

The Companion Planner helps you record the essential details your loved ones will need to settle your affairs. It keeps everything organized in one place so they know exactly where to begin when the time comes.



About AnnCare



We believe no one should face the weight of post-loss paperwork alone.

Born from first-hand experience, we take the burden off families shoulders so the paperwork doesn't become a second job. We handle the calls, the forms, and the notifications, giving your loved ones relief, clarity, and peace of mind.

Why we created the Companion Planner

We have seen countless families spend weeks or months trying to locate information, passwords, or policy numbers during one of the hardest times of their lives. The Companion Planner was built so no one has to go through that again. By taking the time to fill it out now, you give your loved ones a map instead of a scavenger hunt.



How to use it

01. Begin with the personal information section.
02. Complete key accounts and logins next: email, banking, utilities, subscriptions, etc.
03. Move to professional contacts and insurance, loans, and financial accounts.
04. Finish with final wishes: funeral preferences, memorial details, or arrangements.
05. Review your information annually or after any major life change.

You may handwrite directly in this booklet or type and print additional pages if needed. We'd also like to encourage you to keep a small binder or organizer for anything that changes regularly or falls outside this guide.



Personal Information



Date of Birth (DOB)

DOB Location

Current Address

Social Security #

Level of Education

If Applicable:

Drivers License #

Government ID #

Passport #

Veteran

State Benefits

Notes



Other Information



Include relevant details when applicable and where to find.

Will or Trust

Power of Attorney

Advanced Directive

Marriage License

Divorce Papers

Pet Care Information

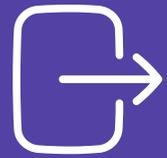
Deeds

Vehicle Registration

Notes



Key Login Details



Include relevant details when applicable.

	Username	Password
Primary Email		
Alternative Email 1		
Alternative Email 2		
Computer		
Cell Phone		

Notes

Be sure to include things like cell phone passwords and security codes, digital password manager details, and instructions for accessing physical items here.



Professional Contacts



Include relevant details for key contacts like lawyers, accountants, doctors, financial planners, real estate agents, doctors, etc.

Name	Email	Phone	Company

Notes



Financial Information (1 of 2)



Include all financial account information including, but not limited to: Bank accounts, credit cards, retirement accounts (401k, IRA, etc), pensions, brokerage accounts, real estate investment trusts (REIT), treasury bonds, etc.

Name	Type	Username	Password	Account #

Notes

Be sure to include things like key points of contact, financial advisors, document storage location, etc.



Financial Information (2 of 2)



Include all financial account information including, but not limited to: Bank accounts, credit cards, retirement accounts (401k, IRA, etc), pensions, brokerage accounts, real estate investment trusts (REIT), treasury bonds, etc.

Name	Type	Username	Password	Account #

Notes

Be sure to include things like key points of contact, financial advisors, document storage location, etc.



Insurance



Include all insurance account information including, but not limited to: life, health, dental, vision, home, renters, auto (car, RV, boat, etc), umbrella, etc.

Provider Name	Type of Insurance	Policy #

Notes



Loans



Include all insurance account information including, but not limited to: mortgage, auto (car, RV, boat, etc), student loan, personal, etc.

Provider Name	Type of Loan	Account #

Notes



Utilities



Address Served

Include all utility account information including, but not limited to: electricity, water, sewage, cable & internet, phone, cell phone, trash, etc.

Provider Name	Type of Utility	Account #

Notes



Other Accounts (3 of 3)



Include all other account information including, but not limited to: streaming subscriptions (Netflix, Disney, Apple, Hulu, Roku), gym and fitness memberships, health and wellness, app subscriptions, digital news and magazines, cloud storage services, loyalty and rewards programs, self storage units, software subscriptions, gaming subscriptions, shopping and delivery subscriptions, professional and trade memberships, community, home service subscriptions, etc.

Name	Username	Password	Account #

Notes

Be sure to include things like key points of contact, financial planners, document storage location, etc.



Social Media



Include all Social Media account information including, but not limited to: Meta (Facebook), Instagram, tik tok, reddit, snap, twitter, LinkedIn, etc.

Social Media	Username	Password

Notes



Other Documents



Include details on the location of vehicle titles, spare keys, rental agreements, home details, etc.

Notes



Funeral and Burial Arrangements



If you have made arrangements, please include who you planned with here.

If not, please select from the following:

Traditional Burial

Cremation

Terramation

Aquamation

Other

If selected other, please explain

Would you like services to be conducted?

Yes

No

If you are not interested in traditional burial options, what would you like to do with your remains?



General



If there's anything that was missed or not covered, this is a great place to include details around it.

Notes



Completing Your Planning



Completing this planner is an essential first step in preparing your affairs. It organizes the information your next of kin will need and helps them understand what exists, where it is, and how to access it. But even with everything documented, your loved ones will still face the extensive administrative work that comes after a loss — phone calls, notifications, account closures, benefit claims, and the long list of follow up tasks required.

If you would prefer to remove that burden entirely, you can pre-purchase our estate support services. We handle these tasks directly on your family's behalf, ensuring they are not left to manage it alone.

On average, we save families 80 hours of administrative work and hundreds of dollars in recurring charges that would otherwise continue to come out of your estate. You can purchase this in advance directly on our website or contact us with any questions. And because you've made it this far, be sure to use the code **COMPANIONPLANNER2026 for 10% off.**

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