

HAVEN STEPS:

A GENTLE GUIDE FOR AFTER I'M
GONE



DYNASTY
HAVEN

WORKBOOK

Introduction

At Dynasty Haven, we believe care doesn't end when a life does, it continues in the love, strength, and decisions that follow. Haven Steps: A Gentle Guide for After I'm Gone was created with the families we serve in mind. During a time that may feel overwhelming or uncertain, this guide is here to provide clarity, direction, and comfort.

Inside, you'll find a carefully organized checklist to help your loved one take the most important next steps after your passing. From who to notify to handling essential documents, each page offers gentle reminders and actionable tasks during a tender time.

This isn't just paperwork, it's a final act of care, a gift of peace, and a roadmap left in love. Whether used by a spouse, child, friend, or executor, may this guide lighten the load and honor your wishes well.



DYNASTY HAVEN - HERE WHEN IT MATTERS MOST

Dynasty Haven is a locally rooted care agency serving Bloomington, IN and surrounding areas. We offer compassionate in-home care, advance care planning, and grief informed support for every stage of life's journey.

Scan the QR Code to learn more about our services, notary options, and resources for families and caregivers.

MY PERSONAL INFORMATION

☐ Birthdate:

☐ Place of Birth:

☐ Social Security Number:

☐ Charitable, Religious, Fraternal Organizations/Boards:

☐ Education (school, college, university):

☐ Full Name:

☐ Home Address:

MY PERSONAL INFORMATION

☐ Pet(s) Names:

☐ Parents/Siblings Full Names (maiden names):

☐ Spouse Full Name:

☐ Primary Care Provider:

☐ Phone Number(s):

☐ Other Information:

ADVANCE CARE PLANNING DOCUMENTS

☐ Advance Directive:

☐ Do Not Resuscitate:

☐ Executer/Estate Planner:

☐ Funeral Arrangements:

ADVANCE CARE PLANNING DOCUMENTS

☐ Healthcare Proxy:

☐ MOLST/POLST/POST:

☐ Organ/Body Donation Paperwork:

☐ Power of Attorney:

IMPORTANT CONTACT INFORMATION

Name, Phone Number, Email and/or Mailing Address of:

☐ Accountant:

☐ Attorney:

☐ Banker:

☐ Clergy:

☐ Employer:

☐ Executor of Estate:

IMPORTANT CONTACT INFORMATION

Name, Phone Number, Email and/or Mailing Address of:

☐ Financial Planner:

☐ Funeral Home:

☐ Health Care Proxy:


☐ Insurance Agent:

☐ Pension/Retirement Fund Contact:

☐ People Who Should be Notified:

IMPORTANT CONTACT INFORMATION

Name, Phone Number, Email and/or Mailing Address of:

 Power of Attorney:

Stockbroker:

Tax Preparer:

Other:

LEGAL DOCUMENTS

Death-Related Documents

☐ Appointment of Agent to Control Disposition of Remains:

☐ Certified Death Certificate (Vital Statistic):

☐ Estate Plan:

☐ Legal Will (Vital Statistic):

☐ Living Trust:

☐ Power of Attorney:

LEGAL DOCUMENTS

Death-Related Documents

☐ Transfer on Death:

Other Documents

☐ Armed Forces ID/Discharge Papers:

☐ Birth Certificate (Vital Statistic):

☐ Deeds to Cemetery Plot:

☐ Deeds to Property:

LEGAL DOCUMENTS

☐ Deeds to Vehicle(s):

☐ Divorce Certificate (Vital Statistic):

☐ Driver's License or ID Card (Vital Statistic):

☐ Health Insurance Cards:

☐ Marriage License (Vital Statistic):

☐ Naturalization/Immigration Records/Certificate of Citizenship:

LEGAL DOCUMENTS

☐ Passport:

☐ Personal Files:

☐ Social Security Card (Vital Statistic):

☐ Tax Returns:

☐ Other:

FINANICAL INFORMATION

Online account usernames & passwords, account numbers, asset values, contact information, security questions for the following

☐ Automatic Withdrawals/Payments:

☐ Bank Accounts:

☐ Cryptocurrency:

☐ Donations (recurring and automated):

☐ Expenses or Money I Owe:

☐ Garbage/Lawn Care:

LEGAL DOCUMENTS

☐ Mortgage/Rent:

☐ Property Tax:

☐ Utilities:

☐ Insurance Policies:

☐ Auto/Vehicle:

☐ Health/Dental/Vision (including Medicare):

FINANCIAL INFORMATION

☐ Homeowner's/Renter's:

☐ Life:

☐ Long-Term Care:

☐ Investment Accounts:

☐ Loans in My Name:

☐ Credit Cards:

FINANCIAL INFORMATION

☐ Home Equity/Reverse Mortgage Loans:

☐ Loans I Have Co-Signed For:

☐ Other Loans (personal, private, other secured loans):

☐ Property Loans:

☐ Student Loans:

☐ Vehicles:

FINANCIAL INFORMATION

☐ Memberships (gyms, clubs, associations, etc.):

☐ Money or Assets Owed to Me:

☐ Personal Property:

☐ Real Estate (property):

☐ Retirement Account(s) (pension, 401k, etc.):

☐ Stocks and Bonds:

FINANICIAL INFORMATION

☐ Subscriptions:

☐ Online Services and Goods:

☐ Print Subscriptions - Newspapers and Magazines:

☐ Streaming Devices (Amazon, HBO, Netflix, Hulu, Disney+, etc.):

☐ Vehicles:

☐ Other:

ELECTRONICS AND ONLINE ACCOUNTS

☐ Online Account Access:

☐ Cloud Storage (iCloud, Dropbox, Flickr, etc.):

☐ Delivery Services (food, medication, etc.):

☐ Email Addresses:

☐ Entertainment (streaming channels, music, gaming, etc.):

☐ Healthcare (Electronic Medical Record):

ELECTRONICS AND ONLINE ACCOUNTS

☐ Shopping:

☐ Software Licenses:

☐ Travel:

☐ Web Hosting:

☐ Social Media:

☐ Account Closing:

FINANICAL INFORMATION

☐ Death Announcement Preferences:

☐ Person to Act on My Behalf:

☐ Usernames and Passwords for Each Platform (Facebook, Instagram, TikTok, Twitter, etc.):

☐ Unlocking Electronics/Security:

☐ Apple ID:

FINANCIAL INFORMATION

☐ Cellphone:

☐ Desktop Computer:

☐ Home Security System:

☐ Internet and Wi-Fi Routers:

☐ Laptop:

☐ Tablet:

FUNERAL AND BURIAL PLANS

☐ Burial/Cremation Plans:

☐ Funeral Arrangements:

☐ Heirlooms/Documents of Family History:

FUNERAL AND BURIAL PLANS

☐ Obituary Information:

☐ Personal Possessions I'd Like to Share (attach seperately):

AFTER DEATH CHECKLIST

☐ Arrange for Care of Family and/or Pets:

☐ Collect Documents and Paperwork:

☐ Forward Mail:

☐ Notify Upon Death List:

☐ Obtain multiple copies of the Death Certificate:

☐ Secure Property:

AFTER DEATH CHECKLIST

☐ Secure **Vital Statistics** (required documents):

☐ Birth Certificate:

☐ Certified Death Certificate:

☐ Divorce Certificate:

☐ Driver's License or ID Card:

☐ Legal Will:

AFTER DEATH CHECKLIST

 Marriage License:

 Social Security Card:

 Update/Close Accounts:

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ADDITIONAL SUPPORT FROM DYNASTY HAVEN

Dynasty Haven is here to help with more than care; we're here to ease burdens during life's most tender transitions.

We can assist your family with:

- Final care coordination and planning support
- Connecting to grief counseling and bereavement resources
- In-home wellness checks for surviving loved ones
- Notarization of estate or advance care documents
- Trusted referral for estate attorneys and funeral providers



Reach out to us at:
dynastyhaven22@gmail.com | (812) 369-4076

Scan the QR code to learn more!