HOW TO

Create a Legacy Inventory

SAGEVAULT

A Step-by-Step Guide to Organizing What Matters Most

You've done the basics—and that's a huge step. But if your estate plan is missing a clear, up-to-date inventory of your assets, accounts, and key information, your executor may face months of unnecessary confusion, delays, or costly mistakes.

This guide walks you through how to create a comprehensive Legacy Inventory that goes beyond your will—capturing everything your family will need to protect your wishes and your legacy.

> *Clarity is the greatest gift you can leave behind. It protects your loved ones when they need it most.*

What is a Legacy Inventory

Think of it as your family's "Where Everything Is" document. It's a centralized, easy-to-use record of your assets, accounts, passwords, instructions, and personal wishes.

Done right, it:

- Reduces stress and confusion during a crisis
- Speeds up probate and estate settlement
- Prevents missed accounts or forgotten assets
- Eases communication between loved ones
- Preserves your legacy with clarity

> *This isn't just planning. It's love in action.*

How to Create a Legacy Inventory

1

Step 1:
Personal & Legal Essentials

2

Step 2:
Financial Accounts

3

Step 3:
Digital Assets & Online Accounts

4

Step 4:
Real Property & Personal Valuables

5

Step 5:
Personal Instructions & Family Wishes

6

Step 6:
Where to Store It

01 Personal & Legal Essentials

Item	Details/Notes
Full legal name	
Date of Birth	
Social Security Number (last 4)	
Executor / POA Name & Contact Info	
Attorney Name & Contact Info	
Location of Will / Trust Documents	
Other Key Documents (marriage, military, divorce)	

02 Financial Accounts

Institution	Type (Checking, IRA, etc)	Last 4 of Acct Number	Balance (approx)	Beneficiary Named Y/N	Date

Add more lines as needed or attach bank/investment statements if preferred.

03 Digital Assets & Online Access

Account/ Platform	Username/ Email	Password Location	Notes	Date
Email (Gmail/Yahoo)				
Social Media (FB, IG)				
Online Banking				
Streaming Services				
Password Manager				

If you use a password manager, note how your executor can access it (e.g. master password, recovery plan).

04 Real Property & Personal Valuables

Real Estate

Address	Type (Home, Land, Rental)	Mortgage/ Lien Info	Deed Location	Notes

Vehicles

Make/ Model	Year	Title Location	Loan Info	Notes

Tip: Include photos of key items for insurance and memory purposes.

04 Real Property & Personal Valuables

Valuables & Heirlooms

Item	Location	Notes	Recipient	Date

Tip: Include photos of key items for insurance and memory purposes.

05 Personal Instructions & Family Wishes

Category	Your Preferences/ Notes
Memorial or Funeral Preferences	*(e.g., cremation/burial, music, readings)*
Letters to Loved Ones	*(e.g., location or planned delivery)*
Ethical Will or Legacy Letters	*(optional guidance or values you want to share)*
Social Media Memorialization	*(who should manage, or delete accounts)*
End-of-Life Care Preferences	*(if not already included in medical directives)*

This is where your love and legacy shine. Don't skip the "human" details.

06 Where to Store It

Storage Location	Access Instructions or Notes
Digital Vault or Cloud	*(e.g., login info or platform used)*
USB/External Drive	*(note location and encryption if used)*
Fireproof Safe or Lockbox	*(include combination or key location in your master list)*
With Attorney or Executor	*(name + contact info)*

Be sure to share storage details with at least two trusted people.

Final Legacy Inventory Checklist

Task	Done?	Date	Notes
Personal/Legal Info Listed			
Financial Accounts Recorded			
Digital Access Log Created			
Real Property & Heirlooms Documented			
Personal Instructions & Wishes Written			
Inventory Securely Stored & Shared			

Need Help Filling the Gaps?

You've done the hard part—starting. Now let's ensure your plan is clear, current, and built to last.

Schedule your free 30-minute Legacy Planning Consultation

We'll help you audit your existing plan, create a full inventory, and identify areas where you need professional coordination. No pressure—just thoughtful support.

What SageVault Does Differently

I bridge the gap between meaningful conversations and effective action. I'm your partner who helps you navigate the entire process with confidence.

Estate Planning Essentials - *Starting from scratch*
Transform insights into action plan • Prepare for attorney meetings • Document organization • Family communication

Estate Plan Refresh - *Updating existing documents*
Review current documents • Identify gaps • Coordinate updates • Ensure documents reflect true wishes

Family Alignment Program - *Complex situations*
Facilitate family meetings • Navigate dynamics • Address fairness concerns • Prevent future conflict

You’re not just organizing paperwork —you’re preserving peace, protecting relationships, and passing on your values.

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EXECUTOR & LEGACY PLANNING SERVICES

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