YOUR GUIDE TO GETTING ORGANIZED

Welcome to My Estate Sorted

Thank you for choosing My Estate Sorted. You've taken an important step toward making life easier for yourself and the people who matter most to you.

This workbook is part of our Build Your Own Organizer collection — a flexible way to create a personalized record of important information that your loved ones or trusted representatives may need when you're no longer here or unable to provide it yourself. Start with what you know, return to what you don't, and work at your own pace.

Your Worksheets, Your Way

This workbook includes one Master Copy of each financial worksheet, giving you the flexibility to create a personalized organizer suited to your circumstances.

Print the copies of each worksheet you need to record your accounts, assets and other financial information. Your purchased license determines how many people may use the workbook, while each authorized user can print the copies they need for their own personal records.

Print what you need. Organize it your way.

1. Choose Your Paper Size: Your purchase includes printable PDF files in US Letter and A4 sizes. Choose the version matching your paper and print at Actual Size / 100%. Keep an untouched original PDF stored securely for future printing.

2. Complete Your Information: Print and complete the pages relevant to you. Mark non-applicable items N/A or leave them blank. If you have multiple accounts, properties, or other items, print additional copies of the appropriate pages.

3. Keep Your Information Safe and Secure: Completed pages may contain sensitive personal and financial information. Store them in a secure location, such as a locked cabinet or safe, and limit access to people who genuinely need it. Follow the security requirements of financial institutions and other providers; do not record credentials in ways that breach their policies. Ensure your executor, professional advisor, or another trusted person knows where the organizer is kept and how access can be arranged when appropriate.

4. Review and Update Regularly: Review your organizer twice a year and after significant changes. Replace outdated pages and securely destroy superseded pages containing sensitive information, for example by shredding.

NEED HELP OR UPDATED INSTRUCTIONS? Click Here to view the latest User Guides, printing tips, and product information on our website.

Build Your Own Organizer:

Place your completed pages in a binder or folder. Use tab dividers, protective sleeves, or document pockets to organize related information. Add other My Estate Sorted workbooks as needed.

Your workbook is just one part of the My Estate Sorted collection.

Explore our range of workbooks covering the important areas of your life. Choose individual modules to suit your needs and bring everything together in one comprehensive, personalized organizer.

Explore the complete collection here

Leave clarity, not chaos.

Because one day the people you love will have questions only you can answer.