



💬 Complimentary 15-Minute Intro Chat - Let's discuss your goals and concerns to see how our educational tools and organizational support can assist you. (This is not legal advice; for that, please consult an attorney.)

[Book Your Complimentary Intro Chat](#)

I'm so happy you're interested in planning for your family.

All of our digital downloads are designed for self-guided use so that you can work through them at your own pace, anytime. Each file includes clear, step-by-step organizational prompts to help you compile your information and stay on track as you build your plan.

Disclaimer: These are general educational resources only, not legal, tax, or financial advice. They support personal organization but do not replace professional guidance. For state-specific needs, we recommend consulting an attorney.

If you'd like extra organizational support or want to review your progress together, you're always welcome to schedule a virtual chat with me through Google Meet. My rate for that service is \$100 per hour, in addition to the cost of any digital downloads.

(Digital downloads and virtual consulting are available nationwide in all 50 states.)

Any step is a good step! You may feel overwhelmed at times because there is a lot to complete, but just know what a meaningful effort you're making for your family when you're done. Even an unfinished plan is better than no plan at all.

At Life: Sorted, each package is designed to support your organization, clarity, and preparation so your loved ones have accessible information they can rely on.

1. Legacy Jumpstart Bundle - [click here](#)

Price: \$40

Get Organized with Confidence

Start your planning journey with this essential bundle of foundational tools. Whether you're getting organized for the first time or finally finishing your binder, this pack gives you everything you need to begin.

Disclaimer: These tools provide general organizational prompts; consult an attorney for legal document needs.

Included in this bundle:

- Legacy Binder (Full Edition)
- Binder Homework Checklist
- Binder Preparation List
- Family Communication Guide
- Bonus: Veteran Guide (free with any bundle for veterans)

Delivered as printable and fillable PDFs. Get started today! Your future self (and family) will thank you.

2. Peace of Mind Essentials Bundle - [click here](#)

Price: \$22

Peace of Mind Essentials – Quick-Action Tools for Seniors & Caregivers

Protect your loved ones and support your own readiness. This bundle is designed for seniors, caregivers, and adult children who want to be prepared for everyday and emergency scenarios, without feeling overwhelmed.

Disclaimer: General educational tools only; not advice on safety or legal matters.

Included in this bundle:

- What to Do When Someone Dies
- If I Go Missing – Seniors Edition
- Home Safety for Seniors
- Fraud Protection for Seniors
- Sample Notification Letters
- Bonus: Veteran Planning Guide (if applicable)

Print and complete in under a weekend! Peace of mind has never been easier.

3. Executor & Estate Toolkit - [click here](#)

Price: \$18

Executor & Estate Toolkit – Be Ready to Act When It Matters

Whether you've been named executor, caregiver, or you're helping a parent, this bundle simplifies the process and provides step-by-step organizational clarity.

Disclaimer: These are general reference tools; for estate administration, seek attorney guidance.

Included in this bundle:

- What to Do When Someone Dies
- Probate by State Reference Sheet
- Sample Notification Letters
- Binder Preparation List
- Bonus: Free Veteran Guide with any bundle purchase

Use this toolkit to save time, reduce stress, and take meaningful action, even during emotional moments.

4. Family Planning Conversation Kit - [click here](#)

Price: \$10

Family Planning Conversation Kit – Tools to Start “The Talk”

Need to talk with your parents, partner, or adult children about end-of-life planning but don't know how? This bundle gives you a gentle, helpful way to start the conversation.

Disclaimer: Educational prompts for discussions only; not legal or therapeutic advice.

Included in this bundle:

- Family Communication Guide
- Binder Homework Checklist
- Binder Preparation List
- Bonus: Veteran Planning Guide

Use this kit to open the door to planning with less stress and more clarity.

5. Complete Digital Legacy Binder Package - [click here](#)

Price: \$70

Complete Digital Legacy Binder – Everything You Need to Be Prepared

Get every planning tool in one comprehensive bundle. This is the ultimate Legacy Binder digital system, designed to help you organize, compile, and prepare information for your family's future.

Disclaimer: General organizational system; consult professionals for legal or financial review.

Included in this bundle:

- Legacy Binder (Full Edition)
- What to Do When Someone Dies
- Probate by State Reference Sheet
- If I Go Missing for Seniors
- Home Safety for Seniors

- Fraud Protection for Seniors
- Family Communication Guide
- Binder Homework Checklist
- Binder Preparation List
- Sample Notification Letters
- Bonus: Veteran Planning Guide (if applicable)

Save \$25 and gain peace of mind with a complete planning system in your hands.

6. Digital Legacy Binder - [click here](#)

Price: \$35

The Core Foundation of Your Family's Planning System

Start with the heart of the Life: Sorted system, the Legacy Binder. This comprehensive, fillable 88-page digital kit walks you step-by-step through organizing your personal, financial, and end-of-life information so your loved ones have everything they need in one place.

This binder is the core of your planning journey and forms the base for every Life: Sorted package. Whether you use it on its own or build on it later with our supplemental guides, you'll have a complete, functional foundation for your organization.

Disclaimer: Educational compilation tool only; not a substitute for legal documents.

What's Included:

- Legacy Binder (Full Edition)
- Welcome Letter
- Binder Preparation List
- Assembly Instructions

Supplemental Resources (if purchased separately)

What to Do When Someone Dies (\$10) - 19-Page Fillable Guide - [click here](#)

A step-by-step, fillable guide designed to help you navigate the first days after a loved one passes. This 19-page workbook walks you through essential tasks, from notifications and paperwork to practical next steps, keeping everything organized and easy to manage. Fill it out digitally or print it, your personal, stress-reducing companion in a difficult time. Disclaimer: General organizational prompts; consult professionals for legal processes.

Probate by State Reference Sheet (\$5) - 8-Page Educational Guide - [click here](#)

An easy-to-follow, 8-page guide that breaks down the probate process for all 50 states. Perfect for anyone managing an estate, this guide provides essential information, tips, and state-specific considerations, helping you understand what to expect and how to stay organized. Disclaimer: Educational overview only; not legal advice—consult an attorney for your situation.

If I Go Missing – Seniors Edition (\$5) - 5-Page Fillable Guide - [click here](#)

A practical, fillable 5-page guide designed to give trusted family, friends, or authorities the critical information they need in an emergency. From personal details and medical information to routines, travel, and emergency contacts, this file helps ensure a clear, coordinated response if you ever go missing, become disoriented, or are unable to communicate. Part of the Legacy Binder Series, it's an essential tool for anyone living alone, managing medical conditions, or wanting peace of mind for themselves and loved ones. Disclaimer: General compilation tool; not emergency or legal advice.

Veteran Planning Guide (\$0) - 5-Page Fillable Guide (Free for Veterans) - [click here](#)

A thoughtful, fillable 5-page insert designed to honor veterans and make their important service and benefit information easily accessible to loved ones. This guide helps veterans record military service details, VA benefits, burial preferences, insurance, and key contacts, ensuring their legacy is preserved and their family can act confidently during difficult times. Part of the Legacy Binder Series, it's offered free to veterans as a gesture of gratitude for their service. Disclaimer: Organizational tool for veterans; consult VA or professionals for benefits advice.

Family Communication Guide (\$5) - 5-Page Fillable Guide - [click here](#)

A practical, 5-page fillable guide designed to help you have thoughtful, confident conversations with your loved ones about end-of-life planning. This guide provides scripts, tips, and a mini “binder tour” to clearly explain your Legacy Binder's contents, ensuring your wishes are understood, reducing confusion or conflict, and supporting shared decision-making. Part of the Legacy Binder Series, it empowers families to communicate with compassion, clarity, and confidence. Disclaimer: Educational prompts for discussions; not legal or counseling advice.

Home Safety for Seniors (\$5) - 4-Page Fillable Guide - [click here](#)

A comprehensive, 4-page fillable checklist designed to help seniors living alone maintain a safe and supportive home environment. This guide covers entryways, floors, and stairs, bathrooms, kitchens, lighting, emergency preparedness, medication safety, mobility, fire safety, and more. Part of the Legacy Binder Series, it empowers seniors to live confidently, reduces risks, and provides caregivers with clear guidance, helping ensure peace of mind for everyone involved. Disclaimer: General checklist; consult professionals for personalized safety assessments.

Fraud Protection for Seniors (\$5) - 6-Page Educational Guide - [click here](#)

A practical, 6-page guide designed to help seniors protect themselves and their legacy from scams, identity theft, and financial fraud. This guide explains common scams targeting older adults, offers strategies to safeguard homes and finances, provides legal protections, and includes a fraud safety checklist. Part of the Legacy Binder Series, it empowers seniors and their families to stay informed, vigilant, and prepared, helping maintain security, confidence, and peace of mind. Disclaimer: Educational overview; not financial or legal advice—contact authorities for incidents.

Sample Notification Letters Pack (\$5) - 9-Page Guide - [click here](#)

A practical, 9-page guide offering professionally written, customizable letter templates to guide critical post-death communications. Designed for executors, administrators, and family members,

this resource helps you notify heirs, banks, government agencies, creditors, employers, pension administrators, and credit reporting agencies. Part of the Legacy Binder Series, it simplifies a difficult process, ensures proper documentation, and helps prevent delays or misunderstandings, giving families confidence and clarity during a challenging time. Disclaimer: Template prompts only; customize with attorney review for accuracy.

Power of Attorney (\$5) - 7-Page Fillable Guide (Mostly Educational) - [click here](#)

A practical, 7-page guide designed to help you understand, plan, and organize your Powers of Attorney (POA) before you need them. This mostly educational guide explains the different types of POA, including Durable/Financial, Medical/Healthcare, General, and Limited, general considerations for selecting a trusted agent, and basic steps for preparation. Disclaimer: This is general information only and not state-specific legal advice. To ensure validity in your state, consult an attorney. Includes a fillable POA Planning Worksheet to record your choices, backup agents, and specific instructions, helping you prepare all the information a legal professional will need to finalize your documents. Part of the Legacy Binder Series, this guide empowers you to protect your finances, healthcare, and legal rights, minimizing confusion and stress for your loved ones in times of need.

**Florida Probate Trigger Chart & Checklist (\$5) - 4-Page Guide - [click here](#)
(FL Residents Only)**

This 4-page guide combines two of Life: Sorted's most popular Florida tools into one convenient, easy-to-follow document, perfect for Florida residents who want to understand how to keep their estate simple and avoid unnecessary probate; it outlines which assets transfer automatically, which may require probate, and the key steps to take when handling an estate with minimal assets, including the Florida Probate Trigger Chart (which shows which assets trigger probate and which pass automatically), the Minimal Assets Estate Checklist (step-by-step tasks to settle small estates smoothly), key Florida probate thresholds and summary administration notes, and practical examples and record-keeping tips. Disclaimer: This guide is for informational purposes only and does not constitute legal advice. It is not a substitute for the advice of a licensed Florida attorney, and you should consult one for guidance tailored to your specific circumstances.

Life: Sorted, LLC Disclaimer

We provide only clerical and educational document preparation services—not legal, tax, or financial advice.

Our focus is on helping you organize and compile information into standard forms based on what you provide. For any complex needs or personalized guidance, we'll gladly recommend a qualified attorney for review and support.