



BECAUSE LIFE DOESN'T ORGANIZE ITSELF

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

[Book Your Complimentary Intro Chat](#)

At *Life: Sorted, LLC*, each package is designed to bring you peace of mind, clarity, and a complete plan your loved ones can rely on.

All document preparation services are available exclusively in the State of Florida, fully compliant with Florida law. If you live outside of Florida, you can still access my nationwide digital downloads and virtual consulting services to help you organize and prepare your legacy plan from anywhere in the U.S. lifesorted.llc/downloads



Core Document Preparation - [Schedule a Complimentary Intro Chat to Get Started](#)

Professionally prepared, affordable, and fully compliant with Florida law.

***Scope Note:** *Life: Sorted provides clerical document preparation based on the information you provide. We do not provide legal advice or interpret laws. For legal guidance, consult a Florida attorney.*

- Simple Will – \$200
- Durable Power of Attorney – \$150
- Advance Healthcare Directive (Living Will & Healthcare Surrogate) – \$125
- HIPAA Release – \$100

★ *Family Essentials Package (all four documents) – \$500 (save \$75)*

DIY Legacy Binder Add-On – \$100

Water/fireproof binder with pockets and a complete educational guide.

Includes tools to organize your legal, financial, insurance, funeral, and legacy information. Perfect for those who wish to continue independently with professional guidance.

Notary & Delivery

Included Service Area: Free notary within 15 miles of Port Orange

Travel Fees: \$25 up to 30 miles; \$1 per additional mile thereafter

Document Shipping: UPS with tracking & signature – \$20

I can deliver your completed documents in person with a notary and witnesses when needed, ensuring everything is executed properly and securely.

Young Adult Access Package (Florida Residents, Ages 18+) - [Schedule a Complimentary Intro Chat to Get Started](#)

Designed for families navigating the legal, medical, and education privacy changes that begin at age eighteen. This package helps young adults and their families prepare and organize essential authorization and decision-making documents, so trusted individuals can assist when it truly matters, without overstepping independence.

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Includes Document Preparation and Signing Support For:

- HIPAA Authorization
Allows a trusted person to receive medical information in emergencies.
- Designation of Health Care Surrogate (Florida)
Names who may speak with doctors and participate in medical decisions if needed.
- Durable Power of Attorney (Limited or Full Scope)
Allows a trusted person to assist with financial or legal tasks based on your written instructions.

- FERPA Consent Assistance
Organizational guidance to help the student locate, complete, and record their school's education privacy release form, subject to the school's policies.

Also Includes:

- When Your Child Turns 18: Family Access & Readiness Guide
A fillable planning guide to organize emergency contacts, digital access, family boundaries, and school, medical, and financial access in one place.
- Secure digital copies and organized delivery of all prepared documents
- Clear, step-by-step signing and storage instructions

Young Adult Access Package – \$250 per individual

Sibling Add-On (same household, same appointment) – \$200 each

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Consulting Services - [Schedule a Complimentary Intro Chat to Get Started](#)

In addition to document preparation, we offer **optional consulting services** for an added fee. These sessions provide deeper guidance, organization, and one-on-one support to help you complete your full legacy plan.

Single Individual / Couples Packages

(Couples planning together require additional time and documentation. Each person receives an individualized plan within a shared binder, ensuring both legacies are clearly defined.)

📁 Document Organization Package – \$375 / \$400

Get all your essential documents in one place... finally.

Includes:

- Collection and organization of legal, financial, and personal records
- Custom Master Document List for easy tracking
- Guidance to set up secure physical or digital storage

✓ **Beneficiary & Account Review** – \$175 / \$195

Help compile and organize your beneficiary details for easy review. Includes:

- Assistance gathering information on retirement accounts, life insurance, and financial policies
- Compilation of your beneficiary listings to verify they match your provided records
- General suggestions to consult an attorney or advisor for follow-up, if needed

📁 **Legacy Binder Creation** – \$550 / \$600

Our Signature Service

Your complete plan, all in one place with ongoing support. Includes everything from the **Document Organization Package** and **Beneficiary & Account Review**, plus:

- Copies of key documents (wills, trusts, titles, etc.)
- Medical directives & emergency contact information
- Funeral, burial, and memorial preference worksheets
- Digital assets & password log (for online accounts and devices)
- Important contacts list (attorneys, doctors, caregivers, etc.)
- Optional pet care wishes

★ *Includes all supplemental resources we've created, such as **What to Do When Someone Dies, Veteran Guide, Home Safety for Seniors**, and any future resources automatically added.*

This comprehensive package ensures your legacy plan remains organized, accessible, and up-to-date—today and for years to come.

👪 **Family Meeting Facilitation** – \$225 / \$250

Help your loved ones understand your plan in a calm, guided discussion. *Bundle discount: \$100 when added to the Legacy Binder.*

🔄 **Annual Maintenance Plan** – \$75 / \$100 per visit (*suggested yearly*)

Stay current with yearly check-ins to review and update your documents, beneficiaries, and personal wishes.

Supplemental Resources

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 - [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.

When Your Child Turns 18: Family Access & Readiness Guide (\$5) - 7-Page Fillable Guide - [click here](#)

A practical, fillable guide designed to help families navigate the shift in access, privacy, and responsibility when a child becomes a legal adult. This guide walks young adults and their families through organizing emergency contacts, medical and school access, digital information, and family communication preferences, all in one clear system.

Use it to document who can help in medical or school-related situations, where important authorizations are stored, how digital access should be handled, and how boundaries and support should be balanced. Fill it out digitally or print it. It's a simple, family-centered tool to reduce confusion and increase confidence during unexpected moments.

Jewelry & Valuables Planning Guide (\$5) - 6-Page Inventory & Family Clarity Guide - [click here](#)

A thoughtful, fillable guide designed to help you document, organize, and explain the story behind your most meaningful jewelry and personal valuables. Without clear guidance, these items can become one of the most stressful and conflict-prone parts of settling an estate or managing family transitions.

This guide provides structured inventory logs, storage tracking, and space to record the personal meaning and intended handling of important pieces. Whether used inside a Legacy Binder or on its own, it gives your family a clear reference for what you own, where it is kept, and what matters most to you.



DIY Options

Prefer to organize at your own pace? Visit our **Digital Downloads Library** for printable tools, checklists, and guides that complement our document preparation and consulting services.

Available online at lifesorted.llc/downloads

****Life: Sorted, LLC Disclaimer***

This document provides general educational and organizational information only. Life: Sorted, LLC is not a law firm and does not provide legal, tax, financial, medical, or professional advice.

Life: Sorted, LLC offers clerical document preparation services based solely on the written information and instructions you provide. We do not select documents for you, interpret laws, determine legal rights, or advise on legal consequences.

For legal guidance, state-specific requirements, or personalized advice, please consult a licensed attorney or qualified professional.

Use of our services does not create an attorney-client or professional advisory relationship. Referrals to attorneys or other professionals may be available upon request.

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