Buried In WORK™

CLEAR KIT

Comprehensive **L**egacy & **E**state
Administration **R**esource **K**it

LET'S GET STARTED

This is your practical guide to begin organizing what matters most.

You are about to give the people you care about the gift of organization. This short guide will show you exactly how to use your CLEAR Kit. Read it first. It only takes a few minutes and will save you hours later.

Resources Available At
BuriedInWork.com

TABLE OF CONTENTS

What This CLEAR Kit Is.....iii

What's Included.....iv

Inside The Binders: Table of Contents.....vi

- Orange Binder: Legal, Medical & End-of-Life
- Blue Binder: Personal & Family Information
- Property, Money, & Digital Life

How To Start.....viii

Worksheets & The USB Flash Drive.....ix

How To Scan QR Codes.....x

Disclaimer xi

WHAT THIS CLEAR KIT IS

The CLEAR Kit is a structured system for collecting and organizing important legal, medical, financial, and personal information in one place.

It is designed to be used and updated over time. It can support everyday organization, guide decision making during an emergency, and provide direction after a death. As circumstances change, the information can be revised so the system remains accurate and useful.

The binders contain the "what" of a person's life: key details, document locations, contacts, and summaries. This information is supported by online resources that provide updated guidance on the "how."

Buried in Work maintains Information Hubs, checklists, and planning guides that expand on each topic. Visit BuriedInWork.com or scan the QR codes at the beginning of each section for current guidance and step by step assistance.

This system organizes information so it is clear and usable. It does not replace formal legal documents or grant legal authority.

IF YOU FOUND THIS CLEAR KIT

Take a moment. This system was created to help you. It makes important information easier to locate and understand during a difficult time.

Begin with the Executor's Summary Report at the front of the orange binder. It provides a high level overview of the CLEAR Kit's estate and end-of-life instructions.

The CLEAR Kit organizes information, but legal authority to act is determined by estate planning documents and applicable law. If you are unsure of your role, review those documents or consult an attorney before making decisions.

For additional guidance, visit BuriedInWork.com or scan the QR codes in each section for updated resources and practical support.

Your Estate & End-of-Life Organization System

WHAT'S INCLUDED IN YOUR CLEAR KIT

01 Fire and Water Resistant Storage Case

Your CLEAR Kit includes a locking, fire and water resistant storage case designed to protect your most important information.

It holds your binders and critical documents in one secure place. Built in file folders, zippered compartments, and a sturdy handle make it easy to store, protect, and transport when needed.

02 Three Topic Specific Binders

The CLEAR Kit is organized into three premium faux leather binders, each focused on a specific area of your life.

1. Orange: Legal, Medical, and End of Life
2. Blue: Personal and Family Information
3. Green: Property, Money, and Digital Life

Each binder includes clearly labeled tabs with guided introductions and structured worksheets. Together, they bring scattered details into one system that others can understand and use.

03 Getting Started Booklet

This guide explains how the CLEAR Kit is organized and what to complete first. It also provides helpful context for anyone who may need to use it in the future. Store it inside your storage case for easy reference.

04 Executor's Summary Report

The Executor's Summary Report provides a high level overview of essential information in one place.

Complete this first. It creates a clear starting point and helps the person stepping in quickly understand what exists, where documents are located, and what may require attention.

Instructions for completing the report are located on the first section tab in the orange binder.

05 Digital Worksheets and USB Drive

The included USB drive contains digital versions of your CLEAR Kit worksheets. Use it to print replacement pages or complete the forms electronically using Adobe Acrobat.

You may also use the drive for secure digital storage. It includes both USB-C and USB-A connectors, allowing it to work with most newer and older computers.

06 "Where To Find My CLEAR Kit" Cards

An estate organization system only works if others know it exists.

Complete these notification cards and share them with your executor or trusted individuals. They explain what the CLEAR Kit is, where it is stored, and who should be contacted if something happens.

07 Key Organizer System

Use the Key Organizer System to label and track important physical keys.

Color coded keychains and a matching reference card help you document what each key is for. Clear labeling reduces confusion and prevents delays when access is needed.

EXPLORING YOUR BINDER SECTIONS & WORKSHEETS

Understanding One & Two Adult CLEAR Kits

The CLEAR Kit is available in one adult and two adult versions.

In a two adult CLEAR Kit, sections that contain information unique to each individual are duplicated so each person's details can be recorded separately.

Two Adult CLEAR Kits include tabs labeled "Adult 1," "Adult 2," and "Shared Responses," placed before the applicable sections.

Sections completed separately for Adult 1 and Adult 2 are marked with an asterisk (*) in the following table of contents.

Orange Binder
Legal, Medical & End-of-Life

OVERVIEW & UPDATES
1. Executor's Summary Reports
2. Update Log

WILL & TRUSTS*
3. Last Will & Testament
4. Trusts

MEDICAL ORDERS & CARE WISHES*
5. Advance Directive & Living Will
6. Organ, Tissue, & Body Donation
7. DNR, POLST, & MOLST

POWERS OF ATTORNEY & HIPAA*
8. Medical Authority & HIPAA Authority
9. Financial Authority

CONTACTS, MESSAGES, & INSTRUCTIONS*
10. Key Contacts Log
11. Ethical Will & Legacy Messaging
12. Letter of Instruction
13. Digital Legacy Plan

FINAL RESTING PLACE, FUNERAL, & MEMORIAL*
14. Final Resting Place Instructions
15. Obituary

INSURANCE (HEALTH/MEDICAL, DISABILITY, & LIFE)*
16. Private Medical Insurance
17. Medicare & Medicaid
18. Life, Disability, & Other Insurance

SOCIAL SECURITY*
19. Social Security Benefits

MEDICAL BACKGROUND*
20. Medical History & Records
21. Medical Providers

Inside The Binders: Table of Contents

Blue Binder
Personal & Family Information

PERSONAL BACKGROUND & IDENTIFICATION*
22. Identity and Citizenship
23. Career & Education
24. Residence History
25. Memberships & Affiliations
26. Cultural & Spiritual Identity
27. Military Service

RELATIONSHIPS, FAMILY, & DEPENDENTS*
28. Marriage & Partnerships
29. Family History
30. Siblings
31. Children
32. Adult Dependents

PETS & ANIMALS
33. Pets

Green Binder
Property, Money, & Digital Life

TECHNOLOGY & DIGITAL LIFE
34. Account Access & Authentication
35. Email & Online Accounts
36. Devices & Phone Plans

REAL ESTATE
37. Primary Residence
38. Additional Real Estate

PHYSICAL ASSETS
39. Vehicles
40. Firearms, Weapons, & Accessories
41. Storage Units & Safe Deposit Boxes
42. Collections, Valuables, & Sentimental Items
43. Hidden Valuables & Other Personal Property

FINANCIAL ASSETS & BENEFITS
44. Financial Accounts
45. Employer & Contractual Benefits

INCOME, EXPENSES, & DEBTS
46. Income
47. Expenses & Recurring Payments
48. Debts Owed to You
49. Debts You Owe
50. Net Income

CREDIT CARDS
51. Credit Cards

BUSINESS INTERESTS
52. Business Interests

INSURANCE (NON-LIFE OR MEDICAL)
53. Non-Medical Insurance

TAXES
54. Tax Returns

Beginning Is Easy

HOW TO START

Organizing your life's information takes effort. That's exactly why the CLEAR Kit exists.

The CLEAR Kit is not designed to be completed in a single sitting. You are gathering a significant amount of information, and some sections may require documents, follow up, or conversations with others.

Start with the items below, then work through the rest at a steady pace.

THREE STEPS TO BEGIN

Step 01

Start by reading through the Getting Started booklet.

Next, send the "Where to Find My CLEAR Kit" notification cards to trusted individuals.

Then complete the Executor's Summary Report in the orange binder. Instructions for completing the report are located on the first tab in the orange binder.

Step 02

Begin working through the binders. Complete the sections that apply to your life. A Section Progress Tracking Sheet is located in the Update Log (Section 2) of the orange binder.

Not every section will apply to every household. Leave non-applicable sections blank. If you are unsure whether a section applies, read the introduction page for guidance. For Two Adult CLEAR Kits, complete sections labeled "Adult 1" and "Adult 2" separately as needed.

Step 03

In addition to updating your CLEAR Kit after major life milestones, set a time each year to revisit it. We suggest April 16, the day after Tax Day, as a simple annual reminder.

Also review your information after major events such as marriage, divorce, the birth of a child, relocation, retirement, or significant financial changes.

Worksheets & The USB Flash Drive

WHAT'S INCLUDED ON THE USB DRIVE

Your CLEAR Kit includes a USB flash drive containing digital versions of all worksheets in your kit. The USB does not contain binder tabs and section introductions.

You can use the drive to:

- Print replacement pages
- Complete worksheets electronically using Adobe Acrobat
- Store secure digital backups of important documents

The drive includes both USB-C and USB-A connectors, so it works with most newer and older computers.

HOW THE USB DRIVE IS ORGANIZED

Files are organized in folders by section number to match your binders. Inside each folder you will find:

- INTERACTIVE files for typing and saving
- PRINT files for handwritten completion

For sections that may require multiple profiles, separate numbered files are included.

If you ordered pre-printed worksheets, you may notice the USB includes more files than were printed. That is intentional. Not every family needs every extra page, so additional profiles are provided digitally. Print only what you need.

LOOKING FOR ADDITIONAL WORKSHEETS?

Need additional pages for a section, such as another pet, sibling, or vehicle? Expansion worksheets are available.

Scan the QR code to the right, visit BuriedInork.com/info-hubs/clear-kit-worksheets, or email support@buriedinwork.com for assistance.

HOW TO SCAN THE WORKSHEET QR CODES

A QR code is a square-shaped barcode that, when scanned with a phone's camera, opens a website.

Several worksheets in your Buried in Work CLEAR Kit include a QR code. Scanning a QR code with your phone's camera will open a BuriedInWork.com webpage that provides supplementary details and explanations pertinent to the content of the worksheet.

HOW TO USE A QR CODE

01 Open your phone's camera.

Most smartphones can scan QR codes directly using the camera app. Just point it at the code.

02 Wait for the link to appear.

A notification or link should pop up on your screen. If nothing happens, try moving your phone closer or holding it steady.

03 Tap the link.

This will open the webpage, file, or action connected to the QR code.

You can practice scanning the QR code to the left.
It will open BuriedinWork.com/info-hubs.

DISCLAIMER

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