

Item	Action	Started	Completed	Notes
Organization	Organize genealogy research materials			
Organization	Scan and digitize documents and photos			
Inventory	Inventory hard copies, binders and other items			
Inventory	Inventory digital files			
Inventory	Inventory social media and websites			
Labeling	Label photos, books, documents, etc.			
Digital Footprint	Review online services to handle digital footprint and shutting down online profiles			
Communicate	Have conversation with family about disposition of genealogy research			
Communicate	Have conversation with executor about disposition of genealogy research			
Donate	Contact organization(s) to arrange for donation			
Donate	Prepare items for donation per agreement with organization(s)			
Estate Planning	Prepare codicil to last will and testament			
Estate Planning	Add organization(s) and donation instructions to estate planning papers			
Estate Planning	Include list of social media sites and other online profile information with estate planning papers			