

JD Woods Law PLC

Jacksonville, Florida | FL Bar #0145017

ESTATE ORGANIZER

Prepared for James & Sarah Mitchell

March 22, 2026

Personal Information

Full Name: James & Sarah Mitchell

Spouse/Partner Name: Sarah Mitchell

Date of Birth: 1975-06-15

Spouse/Partner DOB: 1978-03-22

Address: 1842 Oak Lane, Jacksonville, FL 32259

Phone: (904) 555-0123

Email: james.mitchell@example.com

SSN Last 4 Digits: _____

Family

Children:

1. Emily Mitchell - DOB: 2005-09-12 (Adult)

2. Ryan Mitchell - DOB: 2010-01-03 (Minor)

Guardian for Minor Children: Robert & Linda Mitchell

Other Dependents: _____

Important Documents

Will: Home safe

Trust: Attorney office

Poa: Home safe

Healthcare Directive: Home safe

Birth Certificates: Filing cabinet

Marriage License: Filing cabinet

Military Records: _____

Social Security Cards: Home safe

Passports: Home safe

Advisors

Attorney

Name: Jonathan D. Woods

Phone: (904) 555-0199

JD Woods Law PLC

Jacksonville, FL | FL Bar #0145017

Estate Organizer - James & Sarah Mitchell

Email: jdwoods@jdwoodslaw.com

CPA/Tax Advisor

Name: Patricia Chen, CPA

Phone: (904) 555-0177

Email: pchen@example.com

Financial Advisor/Broker

Name: Mark Rodriguez

Phone: (904) 555-0188

Email: _____

Insurance Agent

Name: David Park

Phone: (904) 555-0166

Email: _____

Doctor

Name: Dr. Angela Torres

Phone: (904) 555-0155

Email: _____

Religious Advisor

Name: _____

Phone: _____

Email: _____

Personal Representative/Executor

Name: Robert Mitchell

Phone: (904) 555-0144

Email: _____

Trustee

Name: Jonathan D. Woods

Phone: (904) 555-0199

Email: jdwoods@jdwoodslaw.com

Financial Accounts

Bank Accounts:

1. Chase Bank - Checking (Last 4: 4521)

Brokerage/Investment Accounts:

1. Fidelity - Individual (Approx. Value: \$285,000)

Retirement Accounts:

1. Fidelity - 401(k) (Beneficiary: Sarah Mitchell)

Cryptocurrency:

1. Coinbase (Approx. Value: \$12,000, Seed Phrase Secure: yes)

Real Estate and Vehicles

Real Estate:

1. 1842 Oak Lane, Jacksonville, FL - Primary Residence (Ownership: joint)

Vehicles:

1. 2023 Toyota 4Runner (Title State: FL)

Other Titled Property:

Insurance

Life Insurance:

1. State Farm - Insured: James Mitchell, Beneficiary: Sarah Mitchell, Face Amount: \$500,000

Other Insurance:

1. State Farm - Homeowners (Policy #: HO-28374)

Annuities:

Business Interests

1. Mitchell Consulting LLC - LLC (100% Ownership)

Co-Owners: None

Documents Location: Attorney office

Buy-Sell Agreement: No

Digital Estate

Email Accounts:

1. Gmail - james@gmail.com

Password Manager: 1Password

Master Password Location: _____

Cloud Storage:

Google Drive: Yes

Dropbox: No

iCloud: Yes

OneDrive: No

Social Media Accounts:

1. Facebook - james.mitchell

Desired Disposition: Memorialize

Online Legacy Contacts:

Google Inactive Account Manager: Yes

Facebook Legacy Contact: Yes

Apple Digital Legacy: No

Digital Media Libraries:

1. Kindle - 200+ books

Domains/Websites Owned: mitchellconsulting.com

Online Business Accounts:

Smart Home/Connected Devices: Ring doorbell, Nest thermostat

Two-Factor Authentication Backup Codes: Home safe

Final Wishes

Memorial/Funeral Preference: cremation

Specific Instructions: Small family gathering at St. Augustine beach.

Additional Information for Family: Cancel all subscriptions in 1Password.