

SURVIVOR CHECKLIST

A wonderful gift to provide your survivors and family is information about legal documents, your estate, and your wishes regarding important decisions.

This checklist is just a guideline to get you started. Each person will have other pertinent things that may only apply to them that should also be added. Once you have all of this information collected be sure to let someone know where it is.

LEGAL DOCUMENTS

Will and or Trust

Power of Attorney

Durable P.O.A.

Advance Medical Directive

FAMILY DOCUMENTS

Birth Certificates

Proof of Marriage

Dissolution of Marriage

Adoption Papers

Naturalization Papers

Automobile Titles

INSURANCE (Life, Health, Auto, Home) POLICIES

Name of Company

Policy Numbers

Beneficiaries

FINANCIAL MATTERS

Advisor or Planner

Pension name and number

Checking and savings accounts

Investments---stocks, bonds

Annuities

Income Tax Returns for last 3 years

BANKING

Mortgage

Credit Cards

Safe Deposit Box location and key location

Loans and Payments

REAL ESTATE

Property owned and location

MILITARY

DD214

Survivor Benefit Plan Coverage

Veterans Service Organization

OTHER

Biographical information for obituary

Social Security Number

Funeral/Memorial Service Requests and Burial Information

Body, organ, and/or tissue donation requests

Membership in Organizations

Passwords to all electronic accounts

Location of important keys