

AS A GIFT TO YOUR LOVED ONES...

Before the information contained on these pages becomes necessary,
please complete this form and let your loved ones know its location.

I. CONTACT INFORMATION FOR TRUSTED ADVISORS

Name / Phone Number / Address

LAWYER: _____

Check on the advisability of putting houses, cars, etc. in names of both husband and wife. Minor children may need their own lawyer to represent their interests after the death of a parent

FINANCIAL ADVISOR: _____

ACCOUNTANT / CPA: _____

II. LOCATION OF VALUABLE DOCUMENTS

Where Stored

SAFETY DEPOSIT BOX KEY / BANK: _____

NAME OF BACK-UP CO-SIGNER ON SAFETY DEPOSIT BOX: _____

WILL - ORIGINAL: _____

WILL - COPY: _____

WILL - SPOUSE'S ORIGINAL: _____

WILL - SPOUSE'S COPY: _____

DURABLE POWER OF ATTORNEY - ORIGINAL: _____

DURABLE POWER OF ATTORNEY - COPY: _____

LIVING WILL (if applicable): _____

BURIAL INSTRUCTIONS: _____

CEMETERY PLOT DEED (if appropriate): _____

CASH AVAILABLE TO FAMILY (until insurance/benefits paid): _____

BIRTH CERTIFICATE: _____

SOCIAL SECURITY CARD: _____

CHILDREN'S BIRTH CERTIFICATES / ADOPTION PAPERS: _____

MARRIAGE CERTIFICATE: _____

DIVORCE / SEPARATION PAPERS: _____

CITIZENSHIP / IMMIGRATION PAPERS: _____

MILITARY DISCHARGE PAPERS: _____

MILITARY CONTACT / INSTRUCTIONS / LIFE INSURANCE, ETC: _____

PASSPORTS: _____

INCOME TAX RETURNS: _____

CURRENT YEAR INCOME TAX RECORDS / FILE: _____

TITLES / DEEDS FOR REAL ESTATE / VEHICLES: _____

PARTNERSHIP AGREEMENTS: _____

EMPLOYMENT CONTRACTS: _____

INVENTORY OF HOME CONTENTS: _____

MEDICAL / SURGICAL HISTORY: _____

III. THINGS TO DO FIRST

Name / Phone Number / Address

CONTACT PASTOR: _____

CONTACT FAMILY & FRIENDS TO BE NOTIFIED: _____

FRATERNAL / CIVIL PEOPLE TO BE NOTIFIED: _____

MEMORIAL SERVICE:

Where is it to be held (church, funeral home, etc.) _____

What format of service/music/musicians/pastors _____

What about a reception (is this provided by your church/check with pastor) _____

CONTACT FUNERAL HOME: _____

BURIAL/CREMATION WISHES: _____

Preferably pre-arrange with chosen funeral home/include where ashes to be scattered or body buried

DEATH CERTIFICATES (*Count on needing one for each insurance or legal transaction you foresee including changing title on cars, houses, boats, and any other property. Order an additional five to ten to cover unexpected needs:*)

OBITUARY NOTICES (*List papers in which notices should be run. A suggested written-out notice is helpful. Some papers will run the notice at no cost, others will charge. Information about the charges can be obtained when you plan the notices:*)

IV. SUGGESTED NOTIFICATIONS

Name / Phone Number / Address

SOCIAL SECURITY / RETIREMENT PLAN:

To apply for Social Security benefits, the survivor will need the following (as per Form SSA-721 (9-91))

Check with the Social Security office for current information and death benefits available to you

- Survivor's Social Security number and the Social Security number of the deceased
- A death certificate
- Proof of the deceased worker's earnings for the last year (W-2 forms or self-employment tax return)
- Survivor's birth certificate
- Marriage certificate, if you are applying for benefits as a widow, widower, divorced wife, or divorced husband
- Divorce decree, if you are applying for benefits as a divorced wife or husband
- Children's birth certificates and Social Security numbers, if applying for children's benefits
- Your checking / savings account information, if you want direct deposit of your benefits

You will need to submit original documents or copies certified by the issuing office. You can mail or take them to the office. Social Security will make photocopies and return your original / certified documents. If the deceased was receiving Social Security benefits, any checks which arrive after death will need to be returned to the Social Security office. If Social Security checks were being directly deposited into a bank account, the bank needs to be notified of the death, also.

IV. SUGGESTED NOTIFICATIONS (continued)

EMPLOYER: _____

INSURANCE COMPANIES: _____

MORTGAGE / LOAN HOLDERS: _____

BANKS / CREDIT UNIONS / FINANCIAL INSTITUTIONS: _____

V. STORED / LOANED POSSESSIONS / LOCATION

STORAGE FACILITIES: _____

ITEMS PLACED ON CONSIGNMENT: _____

APPRAISALS OF POSSESSIONS: _____

VI. FINANCIAL INFORMATION

CHECKING / SAVINGS ACCOUNTS:

#1 Bank / Account Type & Number / Contact _____

Personal Information Numbers (PINs) / Address _____

#2 Bank / Account Type & Number / Contact _____

Personal Information Numbers (PINs) / Address _____

#3 Bank / Account Type & Number / Contact _____

Personal Information Numbers (PINs) / Address _____

Location of Bank Statements / Cancelled Checks _____

Location of Blank Checks / Current Checkbooks _____

Location of Savings Passbooks _____

CREDIT CARDS / LOCATION OF PAYMENT RECORDS: _____

CERTIFICATES OF DEPOSIT / LOCATION: _____

IRAs / LOCATION: _____

TRUST AGREEMENT / LOCATION: _____

VI. FINANCIAL INFORMATION (continued)

BUSINESS / HOME SAFES – COMBINATIONS & LOCATIONS: _____

STOCK PURCHASE PLAN / CONTACT: _____

PROFIT SHARING PLAN / CONTACT: _____

STOCK BROKER / ACCOUNT NUMBERS: _____

RENTAL PROPERTY RECORDS: _____

DEBT NOTES / LOAN PAPERS: _____

VII. INSURANCE

Company Name / Address / Phone Number / Contact / Contract Number / Estimated Benefit (if any)

HEALTH INSURANCE POLICY: _____

CAR INSURANCE POLICY: _____

GROUP LIFE INSURANCE POLICY: _____

INDIVIDUAL LIFE INSURANCE POLICY: _____
Note any existing loans against life insurance

PROPERTY / CASUALTY / RENTAL INSURANCE POLICY: _____

OTHER (Military, etc.): _____

VIII. SPECIAL REQUESTS / BEQUESTS

Family jewelry, pictures, dishes, tools, books, etc. that you desire a person to inherit. We have been told these special bequests can be handwritten, dated and signed if the sheet of special requests/bequests is mentioned in the will. Check with your lawyer.

***These suggestions are not legal advice, but come from personal experience only.
(compiled by Teacup Ministry, an outreach of Rose Hill Presbyterian Deacons)***

