

About You... provide one for yourself and for each of member of the family

Legal Name	
Social Security #	
Legal residence	
Place of birth	
Date of birth	
Location of will	
Location of safety deposit box & key	
Location of birth certificate	
Location of original deed of trust for home	
Location of original deed of car title and registration	
Location of marriage certificate	
Location of military discharge	
Location of citizenship certificate	
Location of adoption certificate	

Note: you may want to put a copy of documents with this list so your family/friend do not have to hunt for the originals immediately.

### Contacts – who your spouse or executor should call

Name	Phone #	Notes/Relationship
Social Security Admin	1-800-772-1213	Call to report death, request appointment to get death benefit

#### Suggested contacts:

- Sons/ Daughters/ any Family members you want contacted
- Funeral home, plus info for disposition of your body/ashes and if funeral/cremation costs have been prepaid. You might also want to leave a draft obituary
- Friends you want contacted
- Primary doctor
- Dentist
- Veterinarian, in the notes section you may wish to leave instructions on what should happen with your pets
- Attorney
- Life insurance where there is a death benefit, include a policy number in the notes section

## Financial/Medical Contacts

Institution/ Card	Account #	Name on the Account	URL	USER ID	Password	Type of card, account, insurance

Include:

- ✓ Banks/Savings & Loan/Credit unions-make sure every account has a BENEFCIARY!!!
  - Checking accounts
  - Money market accounts
  - Saving accounts
  - CD's
- ✓ Credit & Debit cards
- ✓ Financial institutions holding IRA'S, pensions
- ✓ Insurance including life, medical, dental, vision, home auto, etc.
- ✓ Primary physician, specialty doctors
- ✓ Supplemental health care insurance
- ✓ Drug plan insurance

## Sources of Income/Types of Liabilities

Source	Amount	Payment timing	Form of payment (check, EFT)	Contact Phone number

Include Income sources:

- ✓ Social Security
- ✓ Pension
- ✓ Annuities
- ✓ IRA's
- ✓ Investments
- ✓ 401 K's
- ✓ Interest

Include Liabilities due:

- ✓ Mortgages, rents, services/homeowner fees (if living in a community)
- ✓ Property taxes
- ✓ Quarterly income tax payments

Electronic payments, if bills are paid 'on line'

Company being paid via your bank e-pay capability	Purpose	Fixed or Variable amount	Payment Automatically or Manually Triggered	Frequency

**Include:**

- ✓ Credit cards
- ✓ Landscaping, yard services, cleaning services
- ✓ Utilities (power, sewer, water)
- ✓ Telephone, landline & wireless, internet services
- ✓ Taxes (municipal, county, state, federal, school)
- ✓ Church, schools, charities
- ✓ Newspapers, periodicals
- ✓ Financial services, financial planners