

GET YOUR AFFAIRS IN ORDER!

1. Designate one place in your home where loved ones can find all your important documents – including legal documents:
 - a. Will
 - b. POA (Financial and/or Medical)
 - c. Trust
 - d. Birth Certificate
 - e. Social Security Card and Medicare Card
 - f. Medical Insurance Information
 - g. Marriage Certificate
 - h. Divorce Certificate
 - i. Deed to Primary Residence and other Real Estate Deeds
 - j. Car or Recreational Vehicle Titles including Boats
 - k. List of Safety Deposit Boxes (What is in them and where they are held)
 - l. Savings Bonds
 - m. Partnership or Corporate Operating Agreements
 - n. Insurance Policies – Life, Disability, Long Term Care
 - o. Appraisals
 - p. Bank Accounts (Account numbers and where they are held)
 - q. List of Investment Accounts (Account numbers and where they are held)
 - r. Loans (Account numbers and where they are held)
 - s. Credit cards held in your name and account numbers
 - t. List of any private loans made to children or others – forgiven at death?
 - u. Location of Keys
 - v. Driver's License
 - w. Passport number and location

2. Usernames/Passwords and Website Addresses
 - a. Credit Cards
 - b. Mortgage
 - c. Bank Accounts
 - d. Bill Pay
 - e. Loans
 - f. Car Lease
 - g. Subscriptions and or/Memberships
 - h. Social Media
 - i. Email
 - j. Cellphone
 - k. Wi-Fi and Internet
 - l. Home Security Systems
 - m. Brokerage Accounts/IRAs and 401Ks

3. Pets
 - a. Vet name
 - b. Dietary Needs

- c. Who you want to take your pets
 - d. Medical Needs
 - e. Pets' names and records
4. List of Professionals You Use and Their Contact Information
- a. Doctors and Specialists
 - b. CPA
 - c. Attorney
 - d. Financial Advisor
 - e. Insurance Agent(s)
 - f. Home Maintenance (Lawncare, HVAC, House Cleaner etc.)
 - g. Current Employer and HR Department – name of contact for benefits information
 - h. Home security company
5. Healthcare
- a. Current Medications
 - b. Procedures and Dates
 - c. Allergies
 - d. Any medical conditions that loved ones need to be made aware of
 - e. HIPPA Release
 - f. Dietary Restrictions
6. Funeral Plans
- a. Funeral arrangements (i.e., cremation, memorial service, big party or nothing at all)
 - b. Special instructions (i.e., outfit, songs, pictures and/or special requests)
 - c. If there are any pre-arrangements made for Veterans, Masonic or Knights of Columbus
7. List of Important (Non-Professional) Contacts
- a. Emergency Contact
 - b. Executor
 - c. POAs
 - d. Guardians
 - e. Trustees
 - f. Beneficiaries
8. Special Items/Collectibles
- a. Instructions on what to do with them
 - b. Appraisals for valuable items
 - c. An inventory of valuable items
 - d. Firearms – location, registrations, and permit information
 - e. Any hidden valuables
 - f. Safe – location of keys or combination

9. Bill Pay

- a. Who, when and how much
- b. If it is automated what is the account, it comes out of and is there a password attached
- c. Cable/Internet
- d. Cell Phone
- e. Utilities
- f. Mortgage, rent or home equity line of credit
- g. Car payment
- h. Credit cards
- i. Insurance (Medical, life, car or property)

10. Items to Review

- a. Beneficiary Designations
- b. Estate Documents
- c. Account Ownership/Titling
- d. Property or Vehicle Ownership/Titling
- e. Trust Documents
- f. POAs
- g. Guardians

11. Subscriptions, Memberships to Pay, Close and Cancel

12. If I am unable to Communicate, what would I like my caregiver to know?

13. Veterans

- a. Which branch of service
- b. Dates of induction and discharge
- c. Location of military documents including citations

14. Date of Divorce, Annulment or Spouses Death

15. Location of Adoption Documents or Citizenship Documents

“I Am Dead, Now What?” by Peter Popper press