**INFORMATION IN THE EVENT OF DEATH**

**OR SERIOUS ILLNESS**

**YOUR NAME HERE**

**Burial Wishes**

My preference is to be cremated; however, I defer to XXXX or whoever is making the decision to do what is cost effective and in line with the wishes of the family. I do not need an elaborate funeral or memorial service.

**Obituary**(N.B. – this is only a template; feel free to edit to fit personal tastes and space limitations.)

Insert obit information here – can be draft text, or things you want mentioned (or not mentioned)

**Social Media Information**

I have personal social media accounts on Facebook and Twitter.

*Directions for Facebook*

* My username is XXXXXXXXX. My password is xxxxxx
* To the extent you feel like doing so, please post a short note announcing my death as soon as practical, along with a link to the obituary once it becomes available.
* Unless you feel compelled otherwise, please leave the Facebook account open for six months post death. After that, you may delete it at your discretion.

*Directions for Twitter*

* I don’t use Twitter that much, so you can leave it be if you’d like.
* My username is XXXXXXX and my password is xxxxxxx
* Feel free to leave it up or delete it at any time.

*Directions for Caring Bridge or other similar sites*

* Obviously such sites are more to help the family of the deceased or seriously ill, so I don’t have much guidance here. My preference is that any details of my illness or death be made in very general terms (cause of death, “having a good day” or “having a bad day”) but that detailed information about my health not be shared in this format or any other social media outlet.

**Contact Information For Key People To Notify- please contact all people on this list**

XXXX – Parents

XXXXX– sibling(s)

Employer – a call to any single person on the list below is sufficient.

* Boss: (NAME) – phone:

Joe and Jill – neighbors directly across the street;

Joe Smith – insurance agent (has our auto, home, umbrella and long term care policies)

* (512) XXXXX

**Informational page for those other than Kendel**

If you are reading this, it means (SPOUSE OR CHILD) is not handling my affairs.

If I am ill, defer to the medical directives discussed *infra.*

If I am dead, help (family members) get the low hanging fruit (money and securities in my bank and investment accounts, precious metals and title to the house.) Everything else is just stuff. Dispose of it as needed and without hesitation.

 **Access to Safes**

There are a number of safes/lock boxes in the house.

*Gun Safes*

*Fireproof boxes*

**Access to House**

**Financial Information**

*Employer provided benefits (insurance and 401(k)) and contact info*

When you contact my employer to let them know I’ve become seriously ill or worse, ask the Human Resources department to discuss what benefits are available.

Currently, I have:

* **Health Insurance.**
	+ Any info you wish to put here
* **Employer –Provided Long Term Disability.**
	+
* **Employer-provided Basic Life Insurance.**
	+
* **Employer-provided AD&D Insurance.**
* **Health Savings Account**

**Long Term Care Insurance Info**

* There is a folder labeled “Long Term Care Policy” in Put location of key documents in this document so people can find it.

**Disability Insurance info**

* I have two disability policies.
	+ Policy number: XXXXX (primary)
	+ Policy number: XXXXXX (supplemental)
	+ Account number:
	+ Agent:
* There is a folder labeled “Disability Policy” in (provide reader with the location of all important documents)

**Investment Account Info**

* XXXXXX (contains all investment accounts, including IRAs, ***except for*** my 401(k)).
	+ Website:
	+ ID:
	+ Password:

		- After clicking “log in,” it will ask you one of these questions:
			* Who is XXX?
			* Answer:
* XXXXX(401(k))
	+ Website:
	+ ID:
	+ Password:

**Bank Account Info**

* Bank
	+ Website
	+ Username:
	+ Password is
	+ Debit card (in my wallet):– linked to primary checking
* Credit Union
	+ Account number:
	+ Branch office:
	+

**Property and Liability Insurance Info**

* Insurance Company
	+ We have our home, autos and umbrella policy. Call agent for help with these policies.

**Credit Card Info**

* + XXXXX expiration XX/XX; 3 digit security code XXX
	+ Website:
	+ Username:
	+ Password:

**Mortgage Info**

* Mortgage company
* Loan number:
* Current principal balance as of January 1, 2016:

**Airline Frequent Flyer Info**

* Airlines
	+ Member number
	+ Password:
	+ The balance of points in this account will fluctuate greatly.

**Social Security and Driver’s License Info**

* SSN:
* Texas DL:
* Texas CHL:

**Tax Returns/Turbo Tax Info**

* Prior tax returns and various financial documents for the preceding 8 years can be found in the attic in boxes and plastic containers surrounding the Sentry lock boxes.

**Important Paperwork**

*Wills, advanced directives, Power of Attorneys, HIPAA authorizations, etc*

* These can be found in a folder labeled (Tell the reader where to find your documents)

 **Property Disposal Guidelines**

*Firearms and ammunition*

I would contact Joe Smith and ask on the best way to dispose of the guns. Absent concrete guidance from him, I would contact XXX at…..

*Precious metals*

<directions>

*Vehicle*

The (describe vehicle) has a clear title. The title can be found (location of important documents). I would take it to Carmax and sell it.

*Preparedness supplies*

* Food – Contact local Food Bank and tell them you are calling regarding my estate. Advise him you have XXX and ask if he has ideas on what to do with it.
* Gear – Most of the gear is camping gear. Keep anything you want, and donate the rest to a local Boy Scout troop.
* Personal Laptop – The password is XXXXXX. There is nothing on the laptop of value. Feel free to wipe the drive and give it to a charity.
* Personal Papers – There is nothing worth keeping after my death. I would put the papers in the recycling bin.

*Miscellaneous Personal Property Items* – I do not have any particular recipients in mind for my personal effects. I would donate my clothes to a charity, along with any other personal effects.