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Here are some examples of documentation that could be included in your “in case of death” file:

- ☐ Will
- ☐ Living Trust
- ☐ Durable Power of Attorney
- ☐ Designation of Health Care Surrogate
- ☐ Living Will
- ☐ Organ/tissue donation record
- ☐ Funeral arrangements, insurance, or contracts
- ☐ Insurance policies - life (and beneficiary information), auto, & homeowners
- ☐ Health insurance information (including Medicare or Medicaid, “Medigap” insurance, private health insurance, dental, and Long Term Care insurance)
- ☐ Birth certificate
- ☐ Social Security card (or number)
- ☐ Passport, citizenship, immigration and/or alien registration papers
- ☐ Marriage license
- ☐ DD214 - Military Service Records
- ☐ Credit card account information
- ☐ Mortgage and Loan documents and Promissory Notes
- ☐ Vehicle titles and registrations
- ☐ Property deeds
- ☐ List of regular bills
- ☐ Membership certificates
- ☐ Employer/retirement benefit (pension) plans, pension/profit-sharing plans, etc

- ☐ Financial Account Information – a statement for all accounts and the list of beneficiaries, if any. Including checking, savings, CD's, IRAs, 401ks, investment/brokerage accounts, etc.
- ☐ Stocks and bonds
- ☐ Annuity policies
- ☐ User names and passwords for any online accounts, computers, cell phones and other electronic devices
- ☐ List of safety deposit boxes, where to find keys, and names of authorized users
- ☐ Other Financial Records
- ☐ Income statements for the current year (Social Security, pension, IRA's, annuities, employment, and other income records)
- ☐ IRS income tax returns (for the current and previous year)
- ☐ IRS gift tax returns (for all years)
- ☐ Business interests held, financial statements and agreements, contracts, etc.
- ☐ Court documents for adoptions and divorce (including any property settlement agreements, name changes, prenuptial agreements, etc.)
- ☐ Names and contact information of closest family and friends
- ☐ Names and contact information of all lawyers, accountants, doctors, etc.
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____