

# DEATH DOSSIER

Stacey F. Acri, Esquire  
ACRI LAW OFFICES  
273 E. Northampton St.  
Wilkes-Barre, PA 18702  
(570) 826-5554

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Here's a list of items that you should keep on hand and accessible in the event of your untimely demise:

## Contact List:

- Lawyer
- Accountant
- Financial Planner
- Primary Physician
- Trusted Neighbor
- Landlord / Property Manager

## The Basics:

- Will
- Trust documents
- Durable Financial Power of Attorney
- Birth Certificate
- Social Security Card
- Marriage License or Divorce documents

## Debts:

- Proof of loans made (including mortgage paperwork & student loans)
- Proof of debts owed (to friends, family, credit cards, banks, etc.)

## Miscellaneous:

- Military discharge papers (DD-214)
- Usernames and passwords for any online account, to include social media sites & WiFi
- PIN for phone access
- Combination to home safe
- Partnership and corporate operating agreements
- Your expressed wishes about the disposition of your remains and burial services
- Copies of any applications you have submitted for receipt of benefits (i.e.: VA benefits, Social Security, or claims into insurance companies) or for credit cards or loans
- Names of utility companies, phone company, & any other organization with whom you do business
- Tax returns
- Identify any information you might want in your obituary, including degrees earned, dates of graduation, military service, and/or things you value most
- If you are a parent of minor children, then the birth certificate and social security card for each child

## Medical/Health Care:

- Personal and family medical history
- Living Will / Durable Healthcare Power of Attorney (this should include a HIPPA release)
- Do-not-resuscitate order (if desired)
- Medicare card or medical insurance carrier card

## Life Insurance and other Assets:

- Life insurance policies
- House & Car insurance policies
- IRA information & 401(k) information
- Pension documents
- Annuity contracts
- Proof of ownership of real property, cemetery plot, vehicle titles
- Stock certificates, savings bonds and brokerage accounts
- List of bank accounts, usernames, passwords
- List of safe deposit boxes

*\*Even if you don't manage to find the time to compile these documents, you should - at a minimum - keep a list of where documents are kept or companies to be contacted upon your passing.*