

Survivors Guide

One of the Most Important Gifts You'll Ever Leave Your Family

When a loved one passes away, family members are often overwhelmed with grief while trying to manage financial, legal, and personal matters. Important information can be difficult to find, and decisions must often be made quickly.

This guide was created to help you organize your wishes and essential information in advance, giving your family a roadmap during one of life's most difficult seasons.

Taking the time to complete this guide today can provide comfort, clarity, and peace of mind for those you love tomorrow.

"Love isn't just what we leave behind, it's how well we prepare those we love for the day we're no longer here."



Last Will & Testament Worksheet

Legal Full Name _____ **SS#** _____

Address: _____

City: _____ **State** _____ **Zipcode** _____

Single _____ **Married** _____ **Separated** _____ **Divorced** _____

Do you have children? **Yes** **No**

Child _____ **DOB** _____ **SS#** _____

Child _____ **DOB** _____ **SS#** _____

Child _____ **DOB** _____ **SS#** _____

Final Expenses & Taxes

Do you want your debts, medical expenses, funeral, and burial to be paid with insurance benefits and assets by a **Personal Representative**?

If yes, name the person below:

Name _____

Address _____

City _____ **State** _____ **Zipcode** _____

Phone _____ **DOB** _____ **Email** _____

Personal Property – do you want to leave certain property to specific Individuals? If yes, please name the person responsible for distributing your Property.

Name _____ **Phone** _____ **Email** _____

Social Media & Digital Accounts – List Accounts login information

Cellphone **Login** _____ **PW** _____

Email **Login** _____ **PW** _____

Facebook **Login** _____ **PW** _____

Twitter **Login** _____ **PW** _____

Beneficiaries – who do you want to leave your property to how much?

Name _____ **DOB** _____ **Percent** _____

Name _____ **DOB** _____ **Percent** _____

Name _____ **DOB** _____ **Percent** _____

Name _____ **DOB** _____ **Percent** _____

Pets – Who will take care of them?

Name _____ **Type of animal** _____

Name _____ **Type of animal** _____

Name _____ **Type of animal** _____

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Final or Burial Arrangements

I own burial property.	Yes	No
I have purchased a funeral/burial plan.	Yes	No

If yes, where is the locations of the deed, title or plan:

Name of cemetery, mausoleum or garden:

I want to be cremated.	Yes	No
I have purchased a cremation plan.	Yes	No

I want my ashes scattered by:

Name _____

Location _____

Obituary

I want my obituary to be published	Yes	No
I want my picture with my obituary	Yes	No

Publish my obituary in the following papers:

Obituary comments

ESSENTIAL INFORMATION

Bank Name _____

Account Number _____

Name on Account _____

Checking Savings Money Market Home Equity Loan

Credit Union Name _____

Account Number _____

Name on Account _____

Checking Savings Money Market Home Equity Loan

Auto Insurance Company _____

Agent or Policy # _____

Homeowners/Renters Insurance _____

Agent or Policy # _____

Home Mortgage Company _____

Acct # _____

Credit Cards

MC/AMX/Visa/Discover Acct# _____

MC/AMX/Visa/Discover Acct# _____

MC/AMX/Visa/Discover Acct# _____

Vehicle Loan Company _____

Account # _____ Type _____

Vehicle Loan Company _____

Account # _____ Type _____

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Survivor's To Do List

- **Locate the Will and notify the designated Personal Representative.**
- Contact Funeral Home.
- Locate the deceased's Driver's License, Social Security Card, Debit Card/Check Book/Credit cards, house keys, Vehicles and keys.
- Notify the deceased's Religious leader - Pastor, Priest, Rabbi, etc.
- Notify family, close neighbors, and friends.
- Notify the Benefits Department of the deceased's Employer for Insurance coverages that may apply.
- Investigate possible benefits through social or fraternal organizations, unions, bank/credit union/mortgage companies, and credit cards.
- Obtain 10 to 15 copies of the death certificate to use for notifying state agencies, creditors, banks, or other organizations.
- Identify and address immediate property matters, such as mortgage, rent, and utilities.
- Contact credit cards, utilities, phone companies, cable TV companies, garbage collectors and any other home service to provide a name change or cancellation.
- Cancel routine appointments and services scheduled for the deceased.
- Keep all incoming mail and sort it out later. This prevents loss of bills and checks in the confusion immediately following the death.
- Change insurance policies where the deceased was listed as the beneficiary.

Notify **Social Security** of death and file for any death or survivor benefits that may apply: 800-772-1213.

Contact **U.S. Department of Veterans Affairs** for benefits if the deceased was a veteran. 800-827-1000 or www.va.gov

American Legion – 317-630-1200 - www.legion.org