

*In the event of your death or incapacity, your heirs need a map of your personal affairs.
On a pad of paper or Word document, use the following list as a reference for your answers.
Keep it up to date and be sure your heirs have a current copy.*

1) YOUR HOME

- a) **Security:** *Who has an extra key? Where is an extra key hidden? How does one turn off the security system?*
- b) **Friends/Neighbors:** *Who knows you and watches out for you? Who would help in the event of an emergency?*
- c) **Important Papers:** *Where are your records kept including your Marriage & Death Certificates, Titles, Passports, Divorce Papers, Will, Living Will, Trusts, Organ Donation Form, and Financial and Health Care Powers of Attorney? Where is your safe deposit box, and where is the key?*
- d) **Electronic Devices:** *How do you unlock your cell phone, tablet, and computers?*
- e) **Passwords:** *Where is a list of your passwords?*

2) YOUR PERSONAL CONTACTS

Whom would you like contacted in the event of a major incapacity or death?

Give full names and contact information, including, where applicable, the name of the firm.

- a) Children/Siblings/Family Members
- b) Minister/Pastor/Priest/Rabbi
- c) Friends/Colleagues/Neighbors
- d) Social Worker
- e) Financial Advisor/Broker/Money Manager
- f) Attorneys/Accountant/Banker
- g) Insurance Agent
- h) Veterinarian

3) YOUR HEALTHCARE

- a) Primary & Specialist Physician
- b) Medical & Supplemental Plans
- c) Pharmacy
- d) Preferred Hospital
- e) Preferred Nursing Home
- f) Preferred Funeral Home

4) PREARRANGEMENTS

- a) **Custodial Care:** *Have you made prearrangements for custodial care? If so, where are the details of these prearrangements written? Have you purchased long-term insurance? If so, from what company? Where do you keep the policy?*
- b) **Postmortem Preferences:** *Have you prearranged for postmortem preferences? If so, where are the details of these prearrangements written? Would you like your body to be cremated, buried, entombed, embalmed, donated to science? Do you intend to make an organ donation? Have you purchased a burial plot? A headstone? Have you chosen a funeral home? If so, where are the details of these prearrangements written?*
- c) **Data for Death Certificate:** – for each person
 - Full Legal Name
 - Social Security Number
 - Date of Birth
 - Birthplace
 - Full name of surviving spouse, if applicable
 - Mother's Full Maiden Name
 - Father's Full Name
 - Military Veteran: Yes or No?
 - Race
 - Occupation & Highest Level of Education

5) WHAT YOU OWN

- a) **Bank Accounts & CDs:** For each, provide the name of the bank and account number.
- b) **Investment Accounts:** For each, provide the name of the firm, and the account number.
- c) **Accounts Receivables:** Does anybody owe you money? For each, name the entity or person who owes you money and the location of relevant papers.
- d) **Life Insurance Policies:** Provide company name and policy number.
- e) **Death Benefits:** Contact information and data required to identify you to that institution.
- f) **Real Estate:** For each residence or property, give full address and location of deeds.
- g) **Special Possessions:** Collectibles and antiques with substantial monetary or emotional value.

6) WHAT YOU OWE

- a) **Mortgages:** Include both first mortgage and home equity lines of credit. Provide name of financial institution, loan number, and contact information.
- b) **Car Loans:** Provide name of financial institution, contact information, and loan number.
- c) **School Loans:** Provide name of institution and loan numbers
- d) **Debts You Owe Other People:** For each debt you might have to another person, provide contact information and location of loan note.

7) INCOME

For each income source, name the entity providing the income, how often you receive payments, and location of relevant contact information.

- a) **Salary Income:** For each person, provide employer contact information.
- b) **Social Security:** Indicate account to which it is deposited.
- c) **Pension:** For each pension, indicate whether for husband or wife, from which former employer, and payment schedule, e.g. "annual deposit each May to National Bank".
- d) **Regular Payments from Portfolio:** Provide for each payment, the financial institution, account number, and payment schedule, e.g. "Annual IRA withdrawal from Nat'l Brokerage Account #XXXX, transferred automatically each May to my First Bank checking account #XXXX."
- e) **Rental Income:** Provide property address and payment schedule.
- f) **Trust Income:** Provide name of financial institution and account numbers for trust assets.
- g) **Alimony:** Provide contact information for source of alimony payments.
- h) **Other Income:** Provide contact information and payment schedule.

8) EXPENSES

In addition to regular utilities, property taxes, insurance premiums, and estimated tax payments, provide information for the following regular expenses:

- a) **Credit Cards:** For each card, list the name of the company and credit card number. Include major credit cards as well as department store cards.
- b) **Sums I Have Been Sending to Various Individuals:** Give name, address, typical amount, and frequency of checks.
- c) **Various Services That I Have on Some Regular Arrangement:** Include contact information for landscaper, dog sitter, cleaning help, beauty salon, etc.