



Essential Information: Important Contacts and Documents

Prepared for:

Date of last update:

Take Time to Plan Today

The passing of a loved one can be devastating. The responsibilities of settling their affairs can be draining. How will your family cope? Proactive preparation today will only ease the burden on your survivors later.

Make the arrangements. Assemble your documents. Put a plan in place.

This guide provides a convenient place to list your arrangements and to record where your documents are stored. You will undoubtedly want to talk with us as well as an attorney, your life insurance agent, and other advisors to help assemble your affairs.

Make sure:

- ✓ You have a valid will.
- ✓ Your life insurance is adequate to sustain your family's financial needs.
- ✓ Your federal estate taxes will be held to a minimum.

We also recommend that you give consideration to matters such as:

- What funeral arrangements would you prefer?
- What will be the state of your family's finances if you were to pass away?
- Where would the most practical place be for your survivor(s) to live?
- Specifically, who could be helpful to your survivor(s) in making major decisions?
- What benefits will your survivor(s) be eligible for?
- What records are needed to apply for those benefits, and where are they located?
- If you own a business, what should be done with it upon your death?
- What arrangements should be made for the care of your dependent children?

Take the time to record your information in the following pages. It is a proactive way to help your family through what will be one of the most trying periods of their lives.

Contact Information

PERSONAL IDENTIFYING INFORMATION			
Full Name			
Birth Date			
Birth Place			
Birth Certificate Location			
SSN			
IMPORTANT CONTACTS			
Employer	Name		
	Email		Phone
Executor of Will / Trustee of Trust	Name		
	Email		Phone
Financial Advisor	Name		
	Email		Phone
Accountant	Name		
	Email		Phone
Personal Attorney	Name		
	Email		Phone
Insurance Representative	Name		
	Email		Phone
Physician	Name		
	Email		Phone
Funeral Home	Name		
	Email		Phone
Landlord <i>(if applicable)</i>	Name		
	Email		Phone
Other	Name		
	Email		Phone
Other	Name		
	Email		Phone
Other	Name		
	Email		Phone
Other	Name		
	Email		Phone

Location of Documents

ESTATE PLANNING DOCUMENTS				
Living Will	Location		Law Office	
	Lawyer Name		Phone	
	Last Dated		Executor	
Will	Location		Law Office	
	Lawyer Name		Phone	
	Last Dated		Executor	
Revocable Trust	Location		Law Office	
	Lawyer Name		Phone	
	Last Dated		Trustee	
Safe Deposit Box	Location		Sole/Joint	
	Box Number		Key Location	
OTHER DOCUMENTS				
Insurance Policies	Life			
	Umbrella			
	Property/ Casualty			
	Term			
Durable Power of Attorney				
Deeds for Property				
Stock & Bond Certificates				
Most Recent Tax Return				
Birth Certificate				
Driver's License				
Social Security Card				
Passport				
Marriage Certificate				
Adoption Papers <i>(if applicable)</i>				
Divorce Certificate <i>(if applicable)</i>				
Military Service Records	Location			
Safe	Location		Combination	
Lock Box	Location		Combination	
Other				
Other				

Family Members

CONTACT INFORMATION				
Parent(s)	Name			
	Date of Birth		Phone	
	Name			
	Date of Birth		Phone	
Sibling(s)	Name			
	Date of Birth		Phone	
	Name			
	Date of Birth		Phone	
	Name			
	Date of Birth		Phone	
Spouse	Name			
	Date of Birth		Phone	
Children	Name			
	Date of Birth		Phone	
	Name			
	Date of Birth		Phone	
	Name			
	Date of Birth		Phone	
Grandchildren	Name			
	Date of Birth		Phone	
	Name			
	Date of Birth		Phone	
	Name			
	Date of Birth		Phone	
Other Relatives	Name			
	Date of Birth		Phone	
	Name			
	Date of Birth		Phone	
IN THE EVENT OF MY DEATH...				
Please Contact	Name		Phone	
Other People of Significance	Name		Phone	
	Name		Phone	
	Name		Phone	

Upon Death

BENEFITS

Current Employer Benefits

Pension

To Receive Benefits Bring

Payment Start Date

Payment End Date

Location of Records

Other Benefits

FUNERAL ARRANGEMENTS

Funeral Preferences

Obituary Requests

ADDITIONAL SIGNIFICANT INFORMATION

OTHER NOTES