

MAKING THINGS EASY FOR MY FAMILY

The purpose of this check list is to provide a guide for a surviving family member to deal with what must be done after a death of a loved one(s) has occurred. ***To meet this purpose, it must be filled out by you (if unmarried) or you and your spouse while you are both alive.*** It may not be all inclusive to everyone. Things should be added or omitted as it pertains to you and your family. This is a active document that can be added to or change anytime the things listed change. It is recommended it be looked at annually and update. (Note: Important account numbers should be converted to a family code*).

1. In the event of one or both of our deaths, Call the following people: (List all people with phone numbers.)
2. Call XYZ funeral home or Southside Crematorium and inform them. (If arrangements have not been made, it is highly recommended you do so. It could save an estate thousands of dollars. (Either facility can secure death certificates, for next of kin, request 10 copies)
3. Notify the Branch of Service in the event of the death of a military retiree: Defense Finance and Accounting Service (DFAS at 1-800-322-7411 for all branches except the USCG and its 800-772-8724. Contact the nearest the Casualty Assistance Representative (CAR) at (1-XXX-XXX-XXXX nearest military base.) They will assist spouse to complete application for unpaid pay and a new I D Card and anything else entitled to
4. Notify and set up an appointment with Social Security. (They will assist with filing for benefits and burial allowances. Take the military spouse's DD Form 214s (Armed Forces separation documents). It can affect the benefits of the surviving spouse.)
5. Our (My) will(s) (and living will) is located: _____ (If you don't have one, have a will made indicating where and to whom you want your things to go. (The nearest base legal office will make one up for you at no cost.) The original can be put into a safety deposit box or fire-proof holders, but copies should be given to the exactor and possibly an older sibling. Make sure the exactor and/or someone else is authorized access to the box, even after your death, without going to court.)
6. Notify current and former employers: _____ (Former if there is a pension or 401k involved.)
7. Notify the nearest Veterans Administration office located; _____. (All veterans are entitled to burial allowances. If the veteran drew a disability pension from the VA, it would stop. Depending on the cause of death, the spouse could be eligible for survivors' benefit, but it must be ruled service connected.
8. Life Insurance Policies: (List all policies regardless of who is insured. The list should contain Company, Policy #, Phone # Insured's name and beneficiary/beneficiaries.
9. Important Phone Numbers:
Accountant:
Attorney:
10. Location of Personal Papers: Our birth & marriage certificates, divorce or annulment decrees, wills, passports, life insurance and other policies and DD Form 214s, retirement orders, Etc. These and other important papers are located in our _____

11. Personal Information: (Fill in)

Name:	Spouse:
Address	Same
DOB	DOB
SSAN:	SSAN
Primary Physician:	Same
Allergies:	List
Place of Birth:	Place of Birth
Father: s name and place of birth	Spouse's Information
Mother: name and place of birth	Spouse's
Children: Include names, date, and place of birth	Same (Could be different }
Grandchildren: names and place of birth	Same
Place & Length of current residency:	Same
Military Service: include branch(s) and dates	Same
Occupation: Retired	Retired

12. Affiliations: List all fraternal organizations since some offer death benefits. Be sure to include military service-related organizations, i.e., American Legion, VFW, etc. Some may have blanket AD&D policies on their members.

13. Insurance Companies: List all except those listed elsewhere. (Example: homeowners, umbrella, health, long term care, cancer auto and RV policies etc. Some may have death benefits. Example: AFLAC pays a death benefit if either spouse dies of cancer. Auto and RV policies might also if there was an accident. These are all possibilities if you have the policies.

14. Bank Accounts and Credit Unions: _____ (List all accounts and locations if not local. If they are joint accounts, (both spouses are listed) there should be no problems but check on the banks' policies. If not joint, check who is listed as the beneficiary. Don't forget the CDs and savings bonds. Ask your bank or credit unions if they have an AD&D policy or match account balances up to ___ if the deceased is the primary member.

15. Credit Card Companies: _____. (List card #, point of contact and who is the main card holder. Don't forget those home improvements, gas, Amazon, department store, etc, cards. The account holder is the person who originally applied for the card. If one spouse applies and the other spouse has a duplicate card, the holder is still the originator, and the card will be closed upon notification of death. To ensure that a credit card is available to the surviving spouse, couples should have at least 2 credit cards, each person being the holder of one of the cards.)

16. Investment accounts: _____ (List all investment accounts including issued stock certificates that have been issued to you or your spouse, IRA's , etc, Check the designated beneficiary.

17. Other Items of Value: _____ (List everything, don't leave anything out including promissory notes, and where located. A good example a coin or stamp collections, gold or silver bars, cars, boats, RVs anything)

18. Real Estate:
Residential: (Address, Somewhere FL. Our primary residence since Oct 06 and it is paid for or the mortgage is with: _____.

Commercial/rental Property: List if applicable and info concerning leases etc. Note: All properties held jointly will revert to the surviving spouse or distribution clearly stated in wills or trusts.

19. Indebtedness: _____: List all things financed with account numbers. Example: Except for the outstanding balance with XYZ mortgage company, our 2019 Thor motorhome with ABC Bank and our credit cards. There is no other debt.
20. Burial & Memorial Preparations: (This could be put into a will, but they are not usually read until after a funeral and then it could be too late. It is recommended that desires be put into some other document that will be looked at soon after death.)

Example: I, John Doe, want to be cremated. Contact XYZ Crematorium at 1-XXX-XXX-XXXX for pick-up of remains. I do not want a viewing but would like a Catholic burial mass said. I wish my ashes scattered or buried (State your desires.). (This is a simple example of your wishes.)

I, Jane Doe, want to be cremated and my ashes scattered at the Gulf Island National Seashore, on the cliffs on top of the battery over looking Langdon Beach. I do not wish any services but does want Metallica's Sandman played when the ashes are scattered. Notify the Patchers Club members. They might want to attend the ceremony. Again, have a party and celebrate my life. (More detailed example)

There are no burial policies for either of us. Take what you need out of the estate and the rest will be divided as we have stated in our wills.

*Family code: Because of the nature of this document, If it got into the wrong hands, a financial problem could exist so all numeric numbers should be converted to a family code To design a code find one or two words that are 10 letters in length and no letter is duplicated. Examples: sixth place, michaelxyz. There are possibly millions of combinations available. Under each of the 10 letters you will put a number starting with 1 and ending with 0. If your account # is 3749168 and you are using the sixth place code words that coded number would look like XLTCSPA. Do you have to do this, no? If you don't, make sure this document is in a secure place and available to only people that you trust and need to know.