

PERSONAL AND PRIVATE INFORMATION CHECKLISTS

Created by: _____

Date: _____

The information contained on these pages is private and confidential in nature. My **intention is to provide guidance to my trusted people** who will be asked to handle my affairs in the event of my death. This is not a legal document.

CHECKLIST #1

IMMEDIATE ACTIONS

My Body – Instructions

- Obtain a medical professional’s pronouncement of death
- Organ, tissue donation desires
- Mortuary
- Pre-paid arrangements – described and location of contract
- Order death certificates through mortuary/cremation service. Suggested number: _____

My Burial/Services

- Services desired
- Obituary/Newspaper to contact
- Veterans Administration – yes/no

My Household

- Secure my wallet, purse, keys, credit cards, checkbook, mobile phone
- Feed my pets, arrange for care
- Remove perishables, water plants
- Note: the following people have keys to my house:

Notifications

PLEASE CONTACT	HOW TO CONTACT
Immediate family and close friends	
Extended family and friends	
Key medical professionals	
Legal and financial professionals	
Religious	
Fraternal societies	
Social Security Administration	
Pension provider (Union)	
Health insurance providers	
Employee benefits department	

CHECKLIST #2

IMPORTANT DOCUMENTS

DOCUMENT TYPE	DOCUMENT DATE	LOCATION
Medical Directives		
Quality of Life Statement		
Powers of Attorney		
Will		
Codicils		
Revocable Trust		
Trust Amendments		
Irrevocable Trust		
Marital Agreements		
Marriage Certificates		
Birth Certificates		
Death Certificates		
Divorce Papers		
Military Discharge		
Property Deeds		
Automobile Titles		
Life Insurance Policies		
Annuity Policies		
Promissory Notes		
Home Mortgage Contract		
Loan Agreement		
Business Agreements		
Income Tax Returns		
Gift and Estate Tax Returns		
Mineral Rights, Royalty		
Additional:		

CHECKLIST #3

MY ACCOUNTS

ACCOUNTS CURRENTLY HELD	THIS IS HOW TO GET INFORMATION
Bank/Credit Union Accounts	
Credit Card Accounts	
Investment Accounts (Retirement)* <i>(IRA, Roth IRA, 401(k), 403(b), 457, Annuities)</i>	
Insurance-oriented <i>(Life*, Homeowners, Auto, Long-Term Care)</i>	
Health Spending Accounts <i>(e.g. HSA, Drug Cash Plans)</i>	
Loans	
Property Tax Statements	
Automatic Payment Arrangements <i>(Water, Gas, Electricity, Newspaper, etc.)</i>	
Reward Programs	
Other	

* For these accounts, attach a list of all designated beneficiaries

Note: Some rewards programs, frequent flier rewards or loyalty programs may allow transfers at death

CHECKLIST #4

PRIVATE/SECURE ARRANGEMENTS

SECURE ARRANGEMENTS	DESCRIPTION OF CONTENTS, LOCATION, ACCESS PROTOCOL
Home Safe	
Storage Unit	
Safe Deposit Box*	
Computer, Laptop, Smartphone <i>(photos, music library, cloud storage items)</i>	
Websites that keep valuable information <i>(e.g. email, social media)</i>	
Other	

* Special rules exist under California Probate Code 331 when accessing safe deposit boxes

ADDITIONAL INFORMATION