

# Death Planning Made Easier

## Table of Contents

- Section 1**                      **Possibly needed on the near side of death**
1.                                  **Advance Health Care Directive**
  2.                                  **Durable Power of Attorney for Finances**
  3.                                  **Durable Power of Attorney**
  4.                                  **Health Care: medicines, doctors, health insurance policies**
  5.                                  **Computer Usernames and Passwords**
- Section 2**                      **Probably needed on the far side of death**
6.                                  **Mortuary and Funeral Consumers Alliance Information**
  7.                                  **Preferences of disposition of body**
  8.                                  **Organ Donor Card and Social Security Card**
  9.                                  **Birth Certificate/Marriage Certificate/Service Record (Form DD-214)**
  10.                                 **Contact information of survivors (family, close ones)**
  11.                                 **Draft obituary and photo for newspaper**
  12.                                 **Bank forms: "Pay on Death (POD) Agreement or bank account access for designated beneficiary**
  13.                                 **Suggestions/wishes for celebration of life service (venue, music, poems, theme, etc.)**
  14.                                 **Death notification list with email/address**
- Section 3**                      **Helpful in Settling the Estate**
15.                                 **Contacts for: Attorney, Executor, Financial Advisor, Insurance Agent(s), Church, Tax Preparer, Safe Deposit Box (keys), Combination to Home Safe**
  16.                                 **Access codes and key location for house, office, cars, out buildings, etc.**

## Table of Contents, Continued

17. Living Trust and/or Will
18. Bank Accounts types, computer access information
19. Insurance Policies- property, autos, life (if not put here, a note of location)
20. Deeds to properties, DMV Certificates of Title
21. Taxes most recent copies
22. Debts (mortgage holders, creditors, credit cards, etc.)
23. Affidavit/Notice of Death of Joint Tenant plus Preliminary Change of Ownership Form

*Place the contents above in a 3 ring binder with plastic inserts for each page.*

*Share the location and contents of the binder with your survivors.*