

# Organizing/Preparing for death

## Bank Accounts

Name of Bank \_\_\_\_\_  
Account No. \_\_\_\_\_

Name of Bank \_\_\_\_\_  
Account No. \_\_\_\_\_

## Safety Deposit Box

Location: \_\_\_\_\_ Key Location: \_\_\_\_\_

## Important papers

Birth Certificate  
Location: \_\_\_\_\_

Marriage Certificate  
Location: \_\_\_\_\_

Last Will & Testament  
Location: \_\_\_\_\_

Military Discharge Papers (DD214)  
Location: \_\_\_\_\_

Deeds and Titles  
Location: \_\_\_\_\_

Mortgages and Notes  
Location: \_\_\_\_\_

Income Tax Records  
Location: \_\_\_\_\_

Investments, stocks, bonds  
Location: \_\_\_\_\_

Social Security Numbers:  
Decedent: \_\_\_\_\_  
Spouse: \_\_\_\_\_  
Dependent children: \_\_\_\_\_

## Insurance Policies

Pre-paid Funeral Service Contract  
Company/Funeral Home Name: \_\_\_\_\_  
Account # \_\_\_\_\_

Health  
Company name: \_\_\_\_\_  
Account # \_\_\_\_\_

Auto  
Company name: \_\_\_\_\_  
Account # \_\_\_\_\_

Homeowners  
Company name: \_\_\_\_\_  
Account # \_\_\_\_\_