

# **A GIFT FOR YOUR LOVED ONES**

## **Planning your Final Affairs**

A manual to assist you in putting your personal affairs in order, including possible legacy stewardship in thanks to God for the gifts and blessings given to you.

<b>TABLE OF CONTENTS.....</b>	<b>1</b>
<b>LEGACY SOCIETY REGISTRATION.....</b>	<b>2</b>
<b>INTRODUCTION.....</b>	<b>3</b>
<b>A PRAYER FOR DOING THIS WORK.....</b>	<b>3</b>
<b>RECORDS OF PERSONAL INFORMATION.....</b>	<b>3</b>
<b>DOCUMENTS NEEDED TO GET YOUR AFFAIRS IN ORDER.....</b>	<b>4</b>
Wills.....	4
Christian Preamble.....	5
Planned Gifts to the Church.....	6
Bequests.....	7
Gifts of Life Insurance.....	8
Life Income Gifts.....	8
Make the Church Beneficiary of Retirement Plans.....	8
Gifts of Appreciated Assets: Stock/Real Estate.....	8
Resources to Assist You in Your Gift Planning.....	9
Informing the Diocese and/or Your Parish.....	10
Estate Planning Documents.....	10
Inter Vivos (Living).....	10
Durable Power of Attorney.....	10
Durable Power of Attorney for Health Care and “Living Will” (Health Care Directive).....	11
Organ or Body Donation.....	11
Loving Letter.....	12
<b>TO WHOMEVER TAKES THE RESPONSIBILITY FOR MY FINAL ARRANGEMENTS.....</b>	<b>12</b>
Last Rites.....	13
Burial Service Arrangements.....	14
Additional Information.....	16
Information for My Friends and Family.....	17
Survivor Checklist.....	21
Miscellaneous Thoughts, Notes, Reflections.....	23
Prayers from the Book of Common Prayer.....	24

*(The contents of this manual should not be considered legal advice, which should be obtained from a qualified attorney.)*

## **Registration for the Legacy Society of St. Anthony on the Desert Episcopal Church**

The Legacy Society of St. Anthony on the Desert Episcopal Church is open to anyone who has named St. Anthony on the Desert Episcopal Church in their estate plans, regardless of the size of the gift. The Legacy Society is one of the major ways we spread the ministry of planned giving to other church members. Please join us by simply completing the form below and returning it to the Legacy Fund Board Chairperson.

### **Primary Contact Information:**

Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_  
Phone (home) \_\_\_\_\_ (work) \_\_\_\_\_ (cell) \_\_\_\_\_  
E-Mail (home) \_\_\_\_\_ (work) \_\_\_\_\_

### **Alternative Contact Information:**

Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_  
Phone (home) \_\_\_\_\_ (work) \_\_\_\_\_ (cell) \_\_\_\_\_  
E-Mail (home) \_\_\_\_\_ (work) \_\_\_\_\_

I believe that I qualify to become a member of the Legacy Society of St. Anthony on the Desert Episcopal Church. I have already remembered St. Anthony on the Desert Episcopal Church in my will.

Signature: \_\_\_\_\_ **Date:** \_\_\_\_\_

Please send me more information on:

- Wills
- Life Planning
- Helping St. Anthony on the Desert through Life Insurance
- Gifts to St. Anthony on the Desert that pay me income, i.e. Pooled Income Fund, Charitable Gift Annuities, Charitable Remainder Trusts
- Gifts of Real Estate
- I would like a representative of the Diocese's Office of Planned Giving & Stewardship familiar with estate planning to contact me about exploring the best ways for me to give.
- Other (please specify)

Please return this form to:

Legacy Fund Board Chairperson.  
St. Anthony on the Desert  
12990 East Shea Blvd.  
Scottsdale, AZ 85259

## INTRODUCTION

*“Watch therefore for you do not know on what day the Lord will come.”  
(Matthew 24:42)*

Jesus’ words may seem dire warning to some, but for those who are prepared, they are words of assurance that He will come and be with us and reward our faithfulness. Preparation, true spiritual preparation, encompasses every aspect of our lives: our religious lives, our business lives, our community lives, our family lives and our personal lives.

Each of us is expected to keep his or her house in order and to plan for the future. These are the subjects of this booklet. None of us wants to leave a mess for our families to clean up. If you take care of all the things outlined in this book, it will be a blessing to you and your loved ones.

### A PRAYER FOR DOING THIS WORK

Dear God, who has made us, then given to us this beautiful world.

- ✠ Help us recognize that all we have are gifts from You.
- ✠ Remind us that if we live as if we will never die, we will probably die as if we have never lived.
- ✠ Remind us that we cannot make anyone love us, but that we can let ourselves be loved.
- ✠ Remind us that what is most valuable is not WHAT we have but WHO we have in our lives.
- ✠ Remind us that a rich person is not the one who has the most, but the one who needs the least.

We ask these things, dear God, in the name of Your Son, Jesus Christ, who teaches us what real wealth is. *Amen.*

### RECORDS OF PERSONAL INFORMATION

At the time of a person’s sudden illness or death, family members or friends are often faced with the need for certain information. It is extremely helpful for them to have access to a record of insurance papers, marriage and birth certificates, bank account numbers, investments, etc.

For married couples, each spouse should compile separate information and prepare separate documents, although many of the materials will be the same.

This booklet can help you make decisions about what is to happen to your assets and your corporal self at the time of incapacitation or death. It also provides a place to make and keep a record of the information others would need. It is

important to keep it up to date and in a place known by at least one other family member or a close friend. Review the information periodically, preferably with the person(s) who must use the information.

We suggest that you make one or more copies of the information sheets after completing them. Keep one copy with important papers and put others in sealed envelopes and give them to trusted persons. You might consider keeping one copy in a plastic bag in the freezer. Instructions are not legally binding, but show the intent of the person signing the form as of the date signed.

## **DOCUMENTS NEEDED TO GET YOUR AFFAIRS IN ORDER**

### **Wills**

Almost everyone of legal age needs a will. More than half of Americans die without a will. In any case, the state has a will for you, if you've not made one, and the state is not into charitable giving.

Arizona is a "community property" state. If you are married, most of what you have you own jointly with your spouse; but not necessarily everything. At the death of a spouse who does not have a will, the survivor will normally receive the community property of the deceased and one-half of all of the separate property.

When the survivor—or any unmarried person—has died without a will, the Probate Court of the State of Arizona will decide what is to be done with the assets in accordance with the laws of the state. What difference does it make? Won't the court give your assets to your next of kin? Probably, but nothing will go to your special friend, your church, your school or other favorite charities. In the absence of a will that expresses your wishes clearly and legally, the court will decide according to a formula; it will not consider the special needs of any of your family members.

You can only be certain that your wishes will be carried out as you intend if you make a will and update it every few years or every time your situation changes significantly, such as when moving to another state, your children mature, your marital status changes, a family member is born or dies, you retire, etc. Attorneys recommend that you should review your will every five years.

Making a will is your opportunity to express in legal terms your priorities and concerns for the people and institutions in your life. The rubric from the Book of Common Prayer quoted on the inside front cover reminds readers “. . . to leave bequests for religious and charitable uses.” This offers you a threefold opportunity: to support your church, to be a part of the life of the church community after you have left this life, and to make a witness to your family and friends of what was important and valuable in your life.

After giving thought to what you wish to accomplish with your estate plans, contact your attorney to have your will drawn up. A simple will is usually inexpensive. Even when the will is more complicated, its cost is minimal for the peace of mind it buys—and often for the taxes it saves. If you are clear and organized in what you want to do, you will make the most effective use of your time with an attorney.

### **Christian Preamble**

A Christian Preamble to one’s will allows people to share their faith with family and friends. Through this personal statement of faith, people can deliver an important message to those they love the most. This message of faith will be delivered at a time of grief and loss and will serve to remind friends and family to place their trust in Jesus Christ, just as the person who sent the message did.

The person preparing a will or estate plan should give prayerful consideration to asking the attorney to add a Christian Preamble, such as:

**I, \_\_\_\_\_, of the City of \_\_\_\_\_,  
County of \_\_\_\_\_, and State of \_\_\_\_\_,  
being of sound mind and memory and being under no restraint, do  
make, declare and publish this my last Will and Testament, hereby  
revoking all Wills and Codicils heretofore made by me.**

**In thanksgiving to God for the gifts of life, given in Baptism, and for  
the many blessings which God has showered upon me; and in  
thanksgiving to God for the gifts of faith and hope through Jesus  
Christ; and in thanksgiving to God for the gifts of nurture and love**

**through the Church where I have shared faith and fellowship; I now commend my loved ones to grow in this same faith, being true to their Baptism, knowing that God will continue to provide for them in their lifetime; I encourage them to place their faith and trust in our Lord and Savior.**

**I therefore ... (then the particulars of the Will would follow, leaving gifts as desired to family and friends, but also articulating the gifts left to various Church ministries and charitable causes.)**

Some people also use language such as the following as they make gifts to support various ministries:

**I faithfully respond with a decision to (use any of the suggested wordings below to specify how to make your gift.) This gift is an expression of my thanksgiving and stewardship, with the hope that it will help strengthen and extend the ministries of Jesus Christ in the life of the Church.**

Others may wish to communicate much the same message in their own words. Some insert information about their own history with their church or other organization(s) they support through a bequest in their wills. Please use whatever seems appropriate to you while working with the advice of your attorney.

### **Planned Gifts to St. Anthony on the Desert**

The following are ways you can make a legacy gift. Bequests through your will are perhaps the easiest and most common method. Below you will find suggested wording for language to use in bequests in your will. An attorney should review and approve the language you decide to use. *Use these as samples only and consult legal counsel.*

## Bequests

### General Use Bequest to St. Anthony

“I give, devise and bequeath to St. Anthony on the Desert Episcopal Church, Scottsdale, Arizona, (\_\_\_% of my estate, or a specific sum of money, or description of property, or “the rest residue and remainder of my estate”) to be used for its general tax-exempt purposes and without other restrictions as to use.”

### General Use Bequest to St. Anthony for Endowment

“I give, devise and bequeath to St. Anthony on the Desert Episcopal Church, Scottsdale, Arizona, (\_\_\_% of my estate, or a specific sum of money, or description of property, or “the rest residue and remainder of my estate”) to add to a permanent endowment of which the CPI-adjusted principal is kept intact and only the income and/or appreciation expended, to be administered in accordance with the policies established by the vestry of St. Anthony.

### Restricted Bequest\*

If the purpose of the gift is restricted, we ask that donors consult with the Rector on how to word restrictions so that their wishes are carried out.

If the gift is restricted and is to be an endowment, the purposes should be as general as possible, as specific programs change over time. It is also recommended that the following sentence be added: *If in the future there is no longer a need for the funds so specified or it is unwise, in the opinion of the governing board of said organization, to use the gift for the purposes specified above, then the board may, in its discretion, use the gift for the fulfillment of such other tax exempt charitable objectives as it may designate, keeping in mind the objectives set forth above.*

\* Immediately following any of the above wordings, in order to reduce possible income taxes due on the estate, the attorney may add, “*This gift shall be paid out of “income with respect of a decedent,” as that term is defined in the Internal Revenue Code, to the fullest extent possible. If such “income with respect of a decedent” as valued for U.S. tax purposes is insufficient to pay this bequest, then the bequest shall be paid to the extent necessary out of the general assets of my estate.*”

## **Gifts of Life Insurance**

Life insurance is another way to make a gift to St. Anthony. You can purchase a new policy and make the church the owner and beneficiary; the premiums can be made as contributions to St. Anthony and become tax deductible.

You may also make St. Anthony beneficiary of a percentage or all of an existing policy by simply updating a beneficiary form. Contact your life insurance company to do so.

## **Life Income Gifts**

Life Income Gifts provide you and your designated beneficiary an income for life in exchange for your gift. They can be established in several ways, the most common of which include a Charitable Gift Annuity, a Charitable Remainder Trust, or participation in the Pooled Income Fund. All of these options are available through the Episcopal Church Foundation and other foundations or donor advised funds.

## **Make the Church Beneficiary of Retirement Plans**

You may name St. Anthony as beneficiary of your retirement plan or IRA. There is a tax advantage to doing this as the church does not pay tax on this distribution, while your family would pay tax on this income because it went into the retirement plan tax free. Contact your retirement plan for a new form.

## **Gifts of Appreciated Assets: Stock/Real Estate**

In addition to considering a bequest to your church, you may discover—as you compile the information for this booklet and begin to revise your financial plan—that you have assets which could be given outright to the church now or given with the provision that you receive an income for life (charitable gift annuity, pooled income fund, charitable remainder trust, etc). You may have highly appreciated assets that do not provide much income but cost too much to sell because of capital gains tax. These may be given to the church without capital gains tax, provide income for one or two lives, and offer further tax advantages to you.



## Resources to Assist You in Your Gift Planning

*Planning Your Final Affairs Manual* – available in both Word format and pdf. format at [www.st-anthony.net](http://www.st-anthony.net)

*Episcopal Church Foundation, [www.episcopalfoundation.org](http://www.episcopalfoundation.org)*

## **Informing the Diocese and/or Your Parish**

Anyone who makes arrangements for a legacy gift to the church will be providing funding for future mission and ministry. Providing for such a gift qualifies you for membership in the St. Anthony on the Desert Legacy Society.

Please notify the Church Office so that we may express our appreciation for your generosity and recognize it appropriately through membership in the Legacy Society. Forms to register as a member of the Legacy Society are found in the front of this manual.

## **Estate Planning Documents**

The selection and specific content of an individual's estate planning documents, including those generally described below, depend upon that individual's specific, operative facts and circumstances. You should consult with an attorney of your choice before signing any such documents.

### **Inter Vivos (Living) Trusts**

Living Trusts may be useful for people who wish both privacy concerning their financial matters and speed of administration when assets are passed from one person to another, usually at the time of death. They can be especially helpful for those with real estate in more than one state. Legal counsel is necessary to determine whether a trust would be advantageous to you and to help establish one.

### **Durable Power of Attorney**

A Power of Attorney lets one person (the "Principal") grant to another the power or right to undertake certain acts on behalf of the Principal. A "durable" Power of Attorney is a particular kind of Power of Attorney which expressly provides, in the proper manner, that its effectiveness is not reduced or terminated by the Principal's incapacity or incompetence. Thus the Principal can choose in advance who can act on his or her behalf and negate the need for a court to appoint a legal guardian in case of disability or incompetence.

A Durable Power of Attorney can be as important as a will. The form needs to be witnessed and notarized and should provide for backups should the person named not be able to serve. In some cases, a Living Trust incorporates Durable Power of Attorney provisions. See your attorney about your needs for a Durable Power of Attorney. Powers of Attorney that are general in nature, and particularly those granting someone else authority over any financial matters, should be approached with great caution and signed only after consultation with your attorney.

### **Durable Power of Attorney for Health Care and “Living Will” (Health Care Directive)**

It is important to give authority to someone else to make health care decisions in case of your incapacitation. You need to specify in advance how you want decisions to be made about life-sustaining treatment at the time of dying, or should you be incapacitated.

The Hospice of the Valley’s Health Care Decisions website includes information about Living Wills and Health Care (Medical) Power of Attorney:

[http://www.hov.org/health\\_care\\_decisions.aspx](http://www.hov.org/health_care_decisions.aspx)

The Arizona Advance Directive Registry is a free database for the storage of advance directives (Living Will, Medical Power of Attorney, and Mental Health Power of Attorney): [https://www.azsos.gov/adv\\_dir/](https://www.azsos.gov/adv_dir/)

### **Organ or Body Donation**

Should you wish to donate organs, corneas, or tissue (bone, tendons and ligaments, skin, heart valves or vessels) you can make your advance wishes known by a document of gift, such as your will, or through the Department of Motor Vehicles when you renew your drivers’ license, or by visiting the website:

**[www.livinglegacyregistry.org](http://www.livinglegacyregistry.org)**

Your consent for organ, tissue and cornea donation through the DMV is more general, while the website allows you to specify exactly which organs and tissues you would like to donate. Though your family will be informed of your intentions at your death, it is still a good idea to discuss your wishes with them. Cornea and tissue donation can take place up to age 75, and organ donation up to age 85. Corneas can be donated even from patients with many major medical conditions like cancer.

Should you wish to donate your entire body for the purposes of medical education, you may contact the University of Arizona's Willied Body Program at (520) 626-6083 or go to their website at [www.bodydonation.med.arizona.edu/index.html](http://www.bodydonation.med.arizona.edu/index.html). Should you wish to donate your entire body for medical research, you may contact **biogift.org**. Discussing these choices with your family is also important.

## **Loving Letter**

A will or living trust is a legal document that lets you direct the distribution of your material assets. Often it is also the last communication from you to those you love. In order for you to leave a warmer last communication, we suggest that you also prepare one or more "loving letters" (or audiotapes, videotapes, CD's, etc.) to say the loving things you would like your family and friends to know. These should be kept with your will and copies of other important documents in a place identified in advance to your survivors.

## **TO WHOMEVER TAKES THE RESPONSIBILITY FOR MY FINAL ARRANGEMENTS**

In recognition of my inevitable death, I have given thought to my personal wishes concerning my final arrangements. I feel that the effort I have made to pull information together and state my wishes will minimize the emotional strain on my survivors. I do not wish them to be burdened by the great pressures of having to make immediate decisions on unfamiliar matters that inescapably must be made then if I do not make them now.

Difficult though it may be for me to set this down, I feel that my loved ones would find it more difficult to make the decisions with no indication of my specific wishes.

Though these wishes may not be legally binding, I trust that they will help my survivors avoid confusion, extra expense, or the least self-reproach that might arise because of doubts, omissions, or commissions.

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Signature

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Date

## Last Rites

Remembering all those wretched funerals I have attended and also the truly beautiful and inspiring ones, I make the following plans. I desire and hope my service to reflect my life, faith, and love.

*“The liturgy for the dead is an Easter liturgy. It finds all its meaning in the resurrection. Because Jesus was raised from the dead, we too, shall be raised.*

*The Liturgy, therefore, is characterized by joy, in the certainty that ‘neither death, nor life, nor angels, nor principalities, nor things present, nor things to come, nor powers, nor height, nor depth, nor anything else in creation, will be able to separate us from the love of God in Christ Jesus our Lord.’*

*This joy, however, does not make human grief unchristian. The very love we have for each other in Christ brings deep sorrow when we are parted by death. Jesus himself wept at the grave of his friend. So, while we rejoice that one we love has entered into the nearer presence of our Lord, we sorrow in sympathy with those who mourn.” **The Book of Common Prayer, page 507***

(When possible, it is suggested that you fill out the Burial Service Arrangements form in consultation with your clergy, providing a copy of these instructions for the church.)

## Burial Service Arrangements

Full Name \_\_\_\_\_

Date of Birth \_\_\_\_\_ Date of Death \_\_\_\_\_

Address \_\_\_\_\_

In Charge of Arrangements:

Name \_\_\_\_\_

Phone \_\_\_\_\_

Funeral Home Preference \_\_\_\_\_

Burial Preference \_\_\_\_\_

Reception Preference \_\_\_\_\_

Memorial Gifts Designation \_\_\_\_\_

Floral Preference \_\_\_\_\_

Other Preferences \_\_\_\_\_

### **Service Arrangements:** (check all that apply)

- Church Service                       with Eucharist
- Committal Service (at graveside or columbarium)
- Before Church Service                       Following Church Service
- Open to All     Private by Invitation
- Graveside Service Only

### **Prayer Preference when Eucharist is Celebrated:** (check ONE)

- Rite I – Prayer I     Rite II – Prayer A
- Rite I – Prayer II     Rite II – Prayer B
- Rite II – Prayer C
- Rite II – Prayer D

**Scripture Selections:** (one or two lessons may be read. If there is Communion, a passage from the Gospel always concludes the readings. See separate packet for recommended readings.)

First Lesson \_\_\_\_\_

Psalm between lessons (alternatively a hymn may be used) \_\_\_\_\_

Second Lesson \_\_\_\_\_

Psalm between lessons (alternatively a hymn may be used) \_\_\_\_\_

Gospel \_\_\_\_\_

**Music Selections:** (Optional. Listed below are the various places within the service where music may be inserted, if desired.)

Prelude Selection(s) \_\_\_\_\_

Entrance Hymn \_\_\_\_\_

Hymns between the Lessons (alternatively psalms may be used) \_\_\_\_\_

\_\_\_\_\_

Services with Eucharist:

Hymn during Offertory \_\_\_\_\_

Hymn(s) during Communion \_\_\_\_\_

Sanctus:  Spoken  Sung Music Preference \_\_\_\_\_

Fraction:  Spoken  Sung Music Preference \_\_\_\_\_

Other Special Music and/or vocalist \_\_\_\_\_

Recessional Hymn \_\_\_\_\_

Postlude Selection(s) \_\_\_\_\_

**Service Participants:** (There are a number of places where friends and family may participate in the service, if desired. Names of participants can be indicated below.)

Reader: First Lesson \_\_\_\_\_

Reader: Second Lesson \_\_\_\_\_

Leader: Psalm(s) \_\_\_\_\_

\_\_\_\_\_

Intercessor \_\_\_\_\_

Ushers \_\_\_\_\_

\_\_\_\_\_

Oblation Bearers \_\_\_\_\_

\_\_\_\_\_

Other? \_\_\_\_\_

\_\_\_\_\_

**(Please review the completed form with the Rector and submit a copy to the Church Office)**

**Additional Information:**

Location of cemetery lot deed, crypt deed, columbarium contract:

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I have made arrangements to have certain parts or all of my body donated to:

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Coffin specifications:     Least expensive     Mid-range     Elaborate

I \_\_\_ do / \_\_\_ do not wish to have my coffin open at the funeral home.

Other information for my survivors:

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## Information for My Friends and Family

Final Directions and instructions upon the death of:

\_\_\_\_\_

Name

Date

(File this information where it will be found easily upon your death and provide a copy to a designated family member or the appointed executor of your estate. It is suggested that you also file this with your local church or your attorney, and notify your heirs that the form has been completed for their information.)

Name (Complete) \_\_\_\_\_

Address: \_\_\_\_\_

Birth Date: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

Baptism Date: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_

Spouse's Address: \_\_\_\_\_

Spouse's Birth Date: \_\_\_\_\_ Spouse's Place of Birth: \_\_\_\_\_

Spouse's Baptism Date: \_\_\_\_\_

Church Affiliation: \_\_\_\_\_

Name and Address of Home Church: \_\_\_\_\_

\_\_\_\_\_

Father's Full Name: \_\_\_\_\_

Birth Date/Place: \_\_\_\_\_ Living  Yes  No

Mother's Full Name: \_\_\_\_\_

Birth Date/Place: \_\_\_\_\_ Living  Yes  No

Names, addresses, and phone numbers of living brothers and sisters:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

(We also recommend keeping an up-to-date address and telephone book. This can be a big help in notifying others in times of emergency.)

Location of Book \_\_\_\_\_

Names, addresses, and phone numbers of other persons to notify upon my death:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

The following nearby person has agreed to care for my family (or pets) temporarily:

\_\_\_\_\_

My Occupation: \_\_\_\_\_

Employer (Name & Address): \_\_\_\_\_

\_\_\_\_\_

Social Security Number: \_\_\_\_\_

Last Will Executed on: \_\_\_\_\_ Will is located at \_\_\_\_\_

Personal Representative's ("Executor's") name and address: \_\_\_\_\_

\_\_\_\_\_

Bank Accounts/Savings Institution Accounts/Other Income-Producing Accounts:

<i>Name of Institution</i>	<i>Type</i>	<i>Account Number</i>
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1.	_____	_____
----	-------	-------

2.	_____	_____
----	-------	-------

3.	_____	_____
----	-------	-------

4.	_____	_____
----	-------	-------

5.	_____	_____
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Safe Deposit Box Number & Location: \_\_\_\_\_

Location of Safe Deposit Box Key: \_\_\_\_\_

\_\_\_\_\_

Armed Forces:      Date of Service: \_\_\_\_\_ Branch: \_\_\_\_\_  
Serial Number: \_\_\_\_\_  
Discharge Certificate located at: \_\_\_\_\_

Attorney's name and address: \_\_\_\_\_  
\_\_\_\_\_

Investment counselor or banker's name and address: \_\_\_\_\_  
\_\_\_\_\_

Insurance agent's name and address: \_\_\_\_\_  
\_\_\_\_\_

<i>Life Insurance Co.</i>	<i>Amount</i>	<i>Certificate #</i>	<i>Beneficiary</i>
1. _____			
2. _____			
3. _____			
4. _____			

Insurance Policies are located at: \_\_\_\_\_  
\_\_\_\_\_

Credit and charge accounts:

<i>Company</i>	<i>Account Number</i>
_____	
_____	
_____	

Passwords: Where can one find passwords to accounts on your computer? \_\_\_\_\_  
\_\_\_\_\_ Do you need a password to enter your computer? \_\_\_\_\_  
If so, what is the password or where can it be found? \_\_\_\_\_  
\_\_\_\_\_

Organizations/Associations/Societies/Unions/Lodges/Professional Association, etc. (include office or position--past/present, and check if organization is to be notified).

*Organization*

*Notify?*

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Regarding disposition of personal effects (clothes, jewelry, paintings, etc.) unless otherwise specified in will: *(Note: this list expresses your preferences but has no legal standing; in your will you may incorporate by reference such a list to make it legally binding.)*

*Article*

*Beneficiary*

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Since the survivor will be faced with many problems, the following additional documents may be necessary in establishing rights to insurance, pensions, Social Security, ownership, relationship, etc. Indicate location for each item listed.

**(H) Home (D) Safe Deposit Box (O) Office (A) Attorney**

- |  |   |
|--|---|
| <input type="checkbox"/> Marriage License                                | <input type="checkbox"/> Legal proof of age/birth certificate |
| <input type="checkbox"/> Citizenship papers                              | <input type="checkbox"/> Survivor's Pension Information       |
| <input type="checkbox"/> Bill of Sale for car/title, reg.                | <input type="checkbox"/> Stocks                               |
| <input type="checkbox"/> Bank books                                      | <input type="checkbox"/> Other _____                          |
| <input type="checkbox"/> Deeds to property                               | <input type="checkbox"/> Other _____                          |
| <input type="checkbox"/> Income tax returns,<br>receipts/canceled checks |   |

## Survivor Checklist

- Obtain multiple certified copies of death certificate
- Make copies of dated obituary notice
- Check contents of safe deposit box
- Notify bank/financial institutions
- Notify post office if mail needs to be forwarded
- Locate documents such as marriage certificate, birth certificate, etc.
- Notify Social Security Administration and file for survivor benefits (if applicable)
- File for Veteran's benefits (if applicable)
- File for life insurance benefits, including credit life
- Review life insurance beneficiaries and make necessary changes
- File for fraternal, union and association benefits
- File for employer/retirement benefits (e.g. IRA, 401(k), pension, etc.)
- Order cemetery memorial (marker, monument, niche plate, etc.)
- Pre-arranged funeral planning
- Contact attorney to discuss possible estate files
- Review will or living trust
- Review/update healthcare advance directives (living will, durable power of attorney, etc.)
- Compile list of heirs, next-of-kin and beneficiaries
- Review/transfer car titles(s) into your name

## Survivor Checklist continued...

- Contact creditors (list below)

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- Contact healthcare providers to update records (list below)

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- Close online accounts (Facebook, email, etc.)



