

# Death & Incapacity Planning Checklist

- \_\_\_\_\_ Instructions for your administrator, executor, or personal representative
- \_\_\_\_\_ Will
- \_\_\_\_\_ Powers of Attorney
- \_\_\_\_\_ Trust, if applicable, and names of trustees
- \_\_\_\_\_ Passwords to all computer accounts
- \_\_\_\_\_ Instructions on how to pay all expenses: property taxes, electricity, water, utilities, debts, mortgage, insurance, etc.
- \_\_\_\_\_ Copy of deed
- \_\_\_\_\_ Copy of birth certificate and marriage certificate
- \_\_\_\_\_ Copies of car titles
- \_\_\_\_\_ Safe combination
- \_\_\_\_\_ Life insurance to pay for funeral
- \_\_\_\_\_ Life insurance policies payable to estate, beneficiaries, or other
  - \_\_\_\_\_ Insurance policy
  - \_\_\_\_\_ Administrator information and contact
- \_\_\_\_\_ Funeral Pre-Planning
- \_\_\_\_\_ All account locations, account numbers, and types of accounts
  - \_\_\_\_\_ Checking
  - \_\_\_\_\_ Savings
  - \_\_\_\_\_ Business
  - \_\_\_\_\_ Christmas
  - \_\_\_\_\_ Certificates of Deposit
  - \_\_\_\_\_ Money Market
  - \_\_\_\_\_ Investment
  - \_\_\_\_\_ Retirement
  - \_\_\_\_\_ Annuities
- \_\_\_\_\_ Draft of obituary
- \_\_\_\_\_ Emergency contact names, numbers, and addresses
- \_\_\_\_\_ Names and contact information of investment personnel, retirement managers, or account managers