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DEATH DOSSIER

Here's a list of items that you should keep on hand and accessible in the event of your untimely demise:

The Essentials:

- Will
- Trust documents
- Birth Certificate
- Social Security Card

Proof of Ownership

- Proof of ownership of real property, cemetery plot, vehicle titles
- Stock certificates, savings bonds and brokerage accounts
- Proof of loans made (including mortgage paperwork & student loans)
- Proof of debts owed (to friends, family, etc.)
- Partnership and corporate operating agreements
- Tax returns

Medical/Health Care

- Personal and family medical history
- Living Will / Durable Healthcare Power of Attorney
- Do-not-resuscitate order (if desired)
- Medicare card or medical insurance carrier card

Marriage/Divorce

- Marriage license
- Divorce documents

Bank Accounts

- List of bank accounts, user names, passwords
- List of safe deposit boxes

Life Insurance and Retirement

- Life insurance policies
- IRA information
- 401(k) information
- Pension documents
- Annuity contracts
- House & Car insurance policies

Miscellaneous

- Military discharge papers (DD-214)
- Usernames and passwords (for investments, electronics, and social media sites)
- Your expressed wishes about the disposition of your remains and burial services
- Copies of any applications you have submitted for receipt of benefits (i.e.: VA benefits, Social Security, or claims into insurance companies) or for credit cards or loans
- Names of utility companies, phone company, & any other organization with whom you do business
- Identify any information you might want in your obituary, including degrees earned, dates of graduation, military service, and/or things you value most
- If you are a parent of minor children, then the birth certificate and social security card for each child

**Even if you don't manage to find the time to compile these documents, you should - at a minimum - keep a list of where documents are kept or companies to be contacted upon your passing.*