



Getting Your Affairs in Order

Esther did not expect her 45-year-old husband to die on the operating table. The doctor had assured her it was a simple procedure. Suddenly, however, Esther needed to make funeral arrangements, locate burial plot documents, and find other important records. Fortunately, she and her husband had discussed these issues. Esther knew exactly where to get the records she needed for the funeral arrangements, and where to find the other financial records she would need. She was uncommonly prepared, and that lightened her already heavy burden of crisis and grief.



The death of a loved one is a time of confusion and emotional disruption. It is important that your loved ones know where to find the records they will need when you are gone. The checklist in this publication is designed to help you organize important records and information your survivors will need. By listing locations of important records, you ease the stress on loved ones.

To complete *Your Personal Checklist of Important Documents*, note in writing the location of the original of each document. Use the code at the end of the list to mark the location of a copy of the document. For example, you might have an original birth certificate in a safety deposit box and a copy in a file cabinet at home. You might have more than one copy of the original of a document,

such as a living will. If you are older and spend long periods of time with relatives and friends, you might want to make sure they have copies of important documents, in case you forget to bring copies with you.

Note that some of the documents listed on the form might not apply to you. When you have completed your checklist of important documents, make sure your loved ones know where to find it. In addition, make sure a copy is given to at least one close relative, or to your attorney. Make sure your relatives know if your attorney has a copy. Having this checklist not only will help your survivors, it could help you now or sometime in the future before your death if you need to locate one of these documents for other purposes.



YOUR PERSONAL CHECKLIST OF IMPORTANT DOCUMENTS

Document	Recommended Location Code	Location of Original	Location Code of Copy(s)
Appraisals of Possessions	1		
Appraisals of Property	1		
Automobile Registration and Title	1		
Bank Statements - Current Year	2		
Bank Statements - Last 5 Years	2		
Birth Certificates/Adoption Papers	1		
Burial Plot Papers	1		
Canceled Checks (for one year)	2		
Charge Accounts	2		
Checkbook Records	2		
Credit Card Statements	2		
Debt Contracts (until expiration)	1		
Deeds - Current Property	1		
Deeds - Sold Property	2		
Divorce Papers	1		
Durable Power of Attorney	3		
Employment Papers / Information	2		
Funeral Plans	2		
Healthcare Power of Attorney	2		
Household Inventory List	1		
Insurance Papers - Medical	2		
Insurance Papers - Long-term Care	2		

LOCATION CODE LIST:

- | | |
|--|-----------------------------|
| 1 — Bank Safety Deposit Box | 6 — Relatives/Friends |
| 2 — Home File Cabinet (preferably fire proof) | 7 — Primary Doctor's Office |
| 3 — Lawyer's Office | 8 — Funeral Home |
| 4 — Broker/Bank | 9 — Other |
| 5 — Individual Possessions Carried While Traveling | 10—Not Applicable |

Continued: CHECKLIST OF IMPORTANT DOCUMENTS

Document	Recommended Location Code	Location of Original or of Item	Location Code of Copy(s)
Insurance Papers - Home / Property	2		
Insurance Papers - Automotive	2		
Insurance Papers - Life	2		
Insurance Papers - Disability	2		
Investment Records - Bonds	4		
Investment Records - Stocks	4		
Investment Records - List	2		
Letter of Last Instructions	2		
Living Will	5		
Marriage Certificates	1		
Military Papers	1		
Naturalization Papers	1		
Prenuptial Agreements	1		
Religious Records	2		
Residency Papers	1		
Safety Deposit Box Location	2		
Safety Deposit Box Key	4		
Social Security Card	5		
Tax Returns - Current Year	2		
Tax Returns - Previous 3 Years	2		
Tax Returns - Older than 3 Years	2		
Trust Documents	2		
Wills	1 or 2		

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- | | |
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| 5 — Individual Possessions Carried While Traveling | 10—Not Applicable |

IMPORTANT NAMES, ADDRESSES, and PHONE NUMBERS

List the important names, addresses and phone numbers that may help your survivors in dealing with your affairs. Be sure to list an entry for each person or place noted on Your Checklist of Important Documents.

Bank A: _____

Bank B: _____

Bank C: _____

Current File Cabinets: _____

Permanent Records: _____

Lawyer's Office: _____

Stock Broker: _____

Individual Possessions: _____

Relative A: _____

Relative B: _____

Relative C: _____

Friend A: _____

Friend B: _____

Primary Doctor: _____

Funeral Home: _____

Insurance Agent A: _____

Insurance Agent B: _____

Insurance Agent C: _____

Keep the original checklist with your will so that your executor or personal representative has access to both. We recommend that you give other copies of this checklist to individuals who have copies of your important documents, such as your lawyer or your close relatives. Keep copies of documents such as wills and trust agreements in your home file cabinet for easy access. ♡

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