

# Survivors Checklist

- Social Security Number**  
Document the location of your Social Security card. It will be needed several times throughout the estate distribution process.
- Estate Information**  
List the contact information for your executor, attorney, accountant and financial advisor.
- Will**  
Make sure your will and beneficiary designations are up-to-date. If you do not have a will, the state court generally will disburse the estate assets through probate, as provided by the law of that state.
- Life Insurance**  
Document your life insurance company's contact information. An original policy will be necessary for your beneficiary to claim benefits. This includes both employer and individually owned policies.
- Health Insurance**  
Document your health insurance company's contact information. This may be necessary to claim benefits for any illness or hospitalization prior to death. This includes both employer and individually owned policies.
- Income Sources**  
List your income sources, such as salary, pension, Social Security, annuities, funds, trusts, stock dividends, interest, etc.
- Investment Account Information**  
List the names and addresses of the institutions where you hold investments (bank, employee 401(k), mutual fund etc.) and the account numbers.
- Valuable Assets**  
Document any valuable assets you own and their locations (jewelry, coins, collectibles etc.)
- Safety Deposit Box**  
Make sure that your survivors know the location of safety deposit boxes and keys. In some states, safety deposit boxes are sealed at the owner's death. We suggest that you designate an individual in addition to yourself to access the safety deposit box.
- Property**  
Document a list of property you own (home, rental property, vacation property etc.) and the location of their deeds and mortgage statements.
- Vehicle Information**  
List any vehicles you own or lease (car, boat, motorcycle etc.). If you have any joint vehicle titles, the titles will need to be changed by your survivor.
- Loans**  
List any outstanding loans (car loans, credit cards, mortgage loan) and the lenders name and account numbers.
- Debts Owed To You**  
List any outstanding debts owed to you, including the amount, the borrower's name and contact information.
- Military Discharge**  
Make a copy of your military discharge letter accessible. As an honorably discharged veteran from the Air Force, Navy, Marines or Coast Guard, your estate may be entitled to a burial allowance, burial tag and headstone.
- Social Security**  
Place your Social Security information in a known place. Social Security survivor's benefits are not paid automatically, your survivors will need your Social Security information to apply for these benefits within a certain time limit.

**Utility Companies**  
List the utility companies that provide you service. Utility companies will need to be notified to discontinue service or to change the billing information.

**Access To Other Key Documents**  
List storage location for healthcare proxies, tax returns and passbooks.

**Clubs And Associations**  
List any clubs and/or associations you want to be notified.

**Other Important Information**  
This could include such information as your birth certificate, marriage certificate, naturalization papers, previous tax returns, powers of attorney, clergyman, physician's directive, and any preferences regarding your funeral.

**Names Of People To Be Notified**  
List the people you want your survivors to notify, including family, friends, business partners, associates, your labor union and your power of attorney.

**Key Contact Estate Information:**

**Executor/Attorney For Will**

Name:  
Phone:  
Email:

Notes:

**Power of Attorney/Proxy**

Name:  
Phone:  
Email:

Notes:

**Co-Signer for Safety Deposit Box**

Name:  
Phone:  
Email:

Notes:

**Power of Attorney**

Name:  
Phone:  
Email:

Notes:

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**Key Contact Estate Information:**

**Power of Attorney**

Name:  
Phone:  
Email:

Notes:

**Health Care Directive**

Name:  
Phone:  
Email:

Notes:

**Trustee / Executor**

Name:  
Phone:  
Email:

Notes:

**Other**

Name:  
Phone:  
Email:

Notes:

Document	Recommended Location	Actual Location	How Long to Retain
Birth Certificate, Marriage License and Divorce Papers	Safe Deposit Box		Indefinitely
Home Purchase and Home Improvement Records	Home and Safe Deposit Box		As long as you own the home
Real Estate Deeds	Safe Deposit Box		Until transfer of the property
Vehicle Titles	Safe Deposit Box		Until sale or discard
Will	Lawyer and Safe Deposit Box		Indefinitely
Trust	Trustee and Safe Deposit Box		Indefinitely
Contracts	Lawyer and Safe Deposit Box		As long as current
Military Service Records	Safe Deposit Box		Indefinitely
Household Inventory	Safe Deposit Box		Keep Current
Insurance Policies	Home		Keep All Life Insurance Policies
Stock or Bond Certificates	Investment Representative		Until Cashed in or Sold
Tax Returns	Home		Six years from filing date
Cancelled Checks and Bank Statements	Home		Six years
Receipts for Large Purchases	Home		Until Sale or Discard of Item
Service Contracts and Warranties	Home		Until Expiration
Investment Purchase and Sale Records	Personal Financial Organizer and Investment Representative		Six years after tax filing deadline in year of sale
Passports	Safe Deposit Box		Until Expiration
List of Credit Cards with Account Numbers	Personal Financial Organizer		Keep Current
Health Care Directive/Proxy	Home		Indefinitely
Social Security Card	Home		Indefinitely
Funeral Arrangements	Home with copy in Personal Financial Organizer		Indefinitely
Beneficiary Designation Form	Home with copy in Personal Financial Organizer		Indefinitely