**Essential Documentation for My Heirs**

**Date of completion/edited**

**Funeral home to contact phone number**

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| Make prior arrangements for care of your body |

**Notify your minister/church, phone number**

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| Church members will supply food for family and out of town visitors. |

**Create a list of family members, close friends, and business associates to notify, with contact phone number, etc.**

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**If a veteran—service number and where discharge form DD 214 can be found. Dates served, branch.**

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| Do you wish to be buried in a Military Cometary? |

**Location of Estate documents: Will, Trust, POA health and financial etc. Estate attorney, etc. If using a Safe Deposit Box**—Executor (spouse) must have an original signed copy to get access—I’m told.

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| Who is Executor? Who prepared Will, where is the Will, etc. and contact information. |

**Who to call for general maintenance of home, car, etc.**

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| Electrical, appliance, plumbing, painting, handy man, mechanic, car maintenance |

**ASSETS:**

**List Bank account; Brokerage; Annuities/pensions as well as contact information.**

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**Real Estate and where deeds are located (Include address and Tax Parcel Number, when Taxes are due.)**

**Where Automobile Titles are located; when license renewal is due, etc.**

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**Jewelry, art, etc. and location of items, Special Bequests (include photos)**

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**Other assets, and who are beneficiaries. List contact information.**

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**LIABILITIES:**

**Credit cards with contact information (His/Hers)**

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**Mortgage--with contact information**

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**Other debt—with contact information, account information**

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**OTHER INFORMATION:**

**Insurance: Life, Health, Vehicle, Long-term Care (Keep beneficiaries up to date) and contact information.**

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| List beneficiaries |

**List how bills are paid—List those paid via credit card, automatic checking account, contact info, etc.**

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| See “My Bills Worksheet” – later |

**Income Tax: Prior year’s income tax filing, who prepared and filed out the forms. Keep last 3 years returns.**

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| Where are the forms |

**List contact information for Investment Broker\Advisor, Lawyer, Banker, Executor, etc.**

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**Explain the quality of life you find imperative, or, when to pull the plug. List prepaid or preferred funeral arrangements, your choice of funeral service, what is to be done with your body. Write your Obituary.**

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| Do you want a full funeral service, a graveside burial service, Cremation? Simple casket, ornate? Plan your own funeral service. |

Schedule a meeting with your heirs. Explain this document, its location and purpose. Provide a copy. Explain how much they will inherit???

Add text cell

**Instructions: how to add a line and text cell.**

1. Place the cursor on the blank line where you wish to add text and press Enter.
2. Type the text to describe the purpose of the entry. You may resize the text to 10 points and bold.
3. Place the cursor at the end of the above text and press Enter.
4. Click on the “Insert” tab at the top of the sheet and click on “Table”.
5. Click on the box at the upper left of the display.

To delete a cell, right-click the cell and click on delete rows.