

Things to Find

Things to Find	Check When Found	Location of the Information
Pre-Planning and Advance Directives		
Living will (Documents indicating wishes regarding end of life care)		
Health care surrogate (designated person to make health care decisions when you can no longer make your own)		
Power of Attorney (Legal document indicating who is able to make financial decisions on behalf of another person)		
Memorial, Funeral, or Other Arrangements (arrangements for final resting place and service)		
Identification		
Birth Certificate (Provides accurate record of date of birth, maiden name, parents information, etc. Helpful with writing obituary.)		
Social Security Number (needed for death benefits)		
Passport, Immigration and Naturalization certificate		
Marriage License (Divorce Certificate if applicable)		
Guardianship papers (Legal document indicating who has the right to make decisions for a person who cannot make decisions for him/herself)		
Insurance policies: Health, Accident, Disability, and/or Life		
VA claim number or honorable discharge certificate (Important for getting death benefits)		
Affiliations		
Social or religious (Clubs, Lodges, church, Hall, Mosque, Synagogue etc)		
Spouse(s), children, family members, clergy, friends employer or business colleagues (List their names, phone number and address)		



Education and military records		
Assets/Debts		
Banking: checking accounts, money market accounts, savings accounts, IRAs, CDs (certificate of deposit), others?		
Annuities, mutual fund shares, stocks, bonds, others?		
Safe deposit box (location of box and key)		
Last Will and Testament and lawyer's/executor's name, phone number and address		
Loans: credit cards, installment payments (list where to send payments, amount of payment, for how long, and when payments are due), others?		
Income: Insurance policies, trusts and benefits (life, casualty, death benefits, military, social security, credit union, 401(k) plan, monies received via wills/trusts, etc.), others?		
Income Tax Records- (federal, state, local)		
Real Estate		
Mortgages or rent information (debts on home, office, apartments, condominiums, businesses), others?		
Location of family treasures, jewelry, other items?		
Certificate of ownership for property, cars, boats, etc. and keys for these items		
Insurance policies (flood, real estate)		
Certificate of ownership, contract for cemetery plot		
Bills: utilities, phone, cable TV, internet services, taxes, etc.		

