

## Instructions in the Event of Our Deaths or Incapacitation

Updated: \_\_\_\_\_

Our social security numbers are: you: \_\_\_\_\_ and spouse: \_\_\_\_\_

We have the following checking accounts and savings accounts:

- *Bank* \_\_\_\_\_ *Account type* \_\_\_\_\_ *Account #* \_\_\_\_\_
- *Bank* \_\_\_\_\_ *Account type* \_\_\_\_\_ *Account #* \_\_\_\_\_

We have the following insurance policies:

- Health Insurance: *Company, policy #, agent, premium*
- Long-term-care insurance: *Company, policy #, agent, premium*
- Life insurance: *Company, policy #, agent, premium*
- Home insurance: *Company, policy #, agent, premium*
- Auto insurance: *Company, policy #, agent, premium*
- Other insurance: *Company, policy #, agent, premium*

The location of critical documents:

- Our wills (*location and attorney information, who has copies*)
- Other legal documents such as POAs (*location, who has copies*)
- Life insurance policy (*location*)
- Long-term-care policy (*location*)
- Home insurance (*location*)
- Auto insurance (*location*)
- Auto title/deed/registration (*location*)
- Pension information (*location*)
- Financial account information (*software and paper record locations*)
- Abstract/Deed for house (*location*)
- Income tax records (*software and paper record locations*)

Make sure that the following bills are paid:

- Medical insurance premium (*payment details, date due, amount due, accounts where automatic payments are taken from, etc.*)
- Property taxes(*dates of tax bills*)
- Home insurance (*dates of policy renewal*)
- Other insurance, or recurring expenses that must be maintained
- Other debts (mortgage, car loans, etc) (*dates of bills, institution details*)
- Regular expenses

We have a safe deposit box: *key location, number, bank location, . . .*

We have a safe in the house: *location, combination, . . .*

We have a post office box for some mail delivery: *POBox #, information*

We have a storage locker: *location, number, key location, . . .*

We have additional assets we keep at: *details*

We have the following investment & retirement accounts:

- *Company/Broker*\_\_\_\_\_ *Account type*\_\_\_\_\_ *Account #* \_\_\_\_\_  
*Approximate Total*\_\_\_\_\_
- *Company/Broker*\_\_\_\_\_ *Account type*\_\_\_\_\_ *Account #* \_\_\_\_\_  
*Approximate Total*\_\_\_\_\_

Information about other assets

- House (*owned free and clear or mortgage information*)  
Autos (*owned or car loan*)
- Credit Cards: *number*\_\_\_\_\_ *bank or institution*\_\_\_\_\_

The following people/institutions owe us money

*List with details*

We have made the following arrangements or have the following wishes in case of our deaths

- Cemetery plots: *location & details*
- Funeral arrangements: *preferences, spending desires, . . .*

If possible, we would like you to use the assets you inherit to pay for the following items as your first priority:

- Pay for children's college (*list children still in college and any directions*)
- Charity contributions (*list desired charity and amount or percentage that should be donated*)
- Other spending desires

You should contact the following friends and family:

*List friends, relatives and contact information*