

Considerations for

# End of Life Planning

We live in an electronic world, so when a loved one passes we often lose their personal information. Various financial and personal matters will likely need attention, and having the following information on hand will help ease the situation.

## Personal

- Full name, address, length of time at residence, social security number, date and place of birth, father's name and mother's maiden name, marital status, names and addresses of children, spouse and other family members; schools or colleges attended and degree/honors received, name of employer and position held
- List of membership certificates to any lodges or fraternal organizations that provide death or cemetery benefits
- Location of birth/baptismal certificate, health care proxy, financial power of attorney, MOLST form, social security card, marriage or divorce papers, naturalization or citizen papers, discharge papers from the armed services

## Advisors and Estate Planning

- Update your will or trust
- Names, addresses, and telephone numbers, including lawyer, executor of the estate, life insurance agent, accountant, investment counselor, etc.
- Names of friends/relatives who should be informed of death

## Funeral Preparations

- Instructions about the funeral, memorial service, preferred disposition of body and any specific instruction for clergy or funeral directors

## Financial Documents

- Information about outstanding debts, including credit card information
- Location of safe deposit boxes and keys
- List and location of all insurance policies, including name of the insured, policy numbers, amount, company and beneficiary. May include: life, health, accident, homeowner's, car, disability and burial insurance policies
- List of pension systems that provide disability or death benefits, including social security, veterans' affairs, railroad retirement, government retirement, etc.
- List of all bank accounts, including checking, savings, stocks, bonds, 401(K)/403(b), IRAs, trust documents, credit unions, real estate, property deeds and other major property (including vehicle titles), credit cards, etc.
- List of all PIN numbers, user names and passwords correlated to accounts (internet, etc.)
- Instructions for business operations, if applicable



*Complete connected care<sup>SM</sup>*