

## TABLE OF CONTENTS

[Pocket # & Pocket Contents]

### Section 1 – Possibly needed on the near side of death

1. Advance Health Care Directive
2. Durable Power of Attorney for Finances
3. Health Care Plans
4. Organ Donor Document

*5. Computer passwords*

### Section 2 – Probably needed on the far side of death

5. Memorial Society and/or mortuary information
6. Organ Donor Card and Social Security Card
7. Death Certificate facsimile (Birth Certificate, Marriage Certificate and Service Record may share this pocket)
8. Form indicating preferences regarding handling and disposition of the body
9. List of survivors
10. Draft of obituary and photo for newspaper
11. Suggestions for funeral or memorial service
12. Death Notification Lists

### Section 3 – Helpful in settling the estate

13. List of key sources of assistance (Attorney, Executor, Financial Advisor, Tax Preparer, Safe Deposit Box (keys), Codes (Record of all access codes regarding home, car, office, computer passwords, etc.)
14. Last Will and Testament
15. Living Trust
16. Insurance policies, including auto. Because of bulk, these may be found: (note location here)

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17. Retirement plans
  18. Bank Accounts
  19. Property: Deeds, DMV Certificate(s) of Title
  20. Investments. Because of bulk, these may be found: (note location here)

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21. Debts (List of mortgage holders, creditors, credit cards, etc.)
  22. Taxes – copies of most recent returns. Because of bulk, these may be found: (note location here)

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23. Affidavit/Notice of Death of Joint Tenant plus Preliminary Change of Ownership Form

# **The Death-Made-Less-Difficult Book**

A step by step guide prepared by Rev. William C. Sanford

## **TO GET READY**

- 1. Buy a three-ring binder with pockets on the inside of the front and back covers**
- 2. Create a page headed: When a Loved One Dies: First Things To Do. You may want about ten items on your list. See below for possibilities. Tuck this page in the pocket, back side of front cover.**
- 3. Put in your binder about two dozen clear plastic pockets to hold various documents.**
- 4. Build your own custom Table of Contents using the Table of Contents below as a guide.**
- 5. Put your Table of Contents in the binder's first pocket.**
- 6. Fill the pockets in conformity with the Table of Contents. Altogether there's a great deal of work involved here. You may wish to set a goal of completing one item per week, or two per month (which would complete your book within a year).**
- 7. Tell (show) next-of-kin where you keep your binder.**
- 8. Consult professionals as necessary – clergy, accountant, doctor, attorney, etc.**

## **WHEN A LOVED ONE DIES: FIRST THINGS TO DO**

Where possible include names and phone numbers

- 1. Call 911.**
- 2. Call the mortuary of your choice.**
- 3. Callt your family physician to certify death.**
- 4. Call your immediate family.**
- 5. Call your clergyperson or other party, assuming you desire a funeral or memorial service.**
- 6. Meet with funeral director you've selected. Take your binder which should have everything you'll need.**
- 7. Meet with your clergyperson. Again, take your binder.**
- 8. Supply newspaper(s) with obituary and photo. It will be less expensive if you do this by e-mail.**
- 9. Inform those who should know of the death. This task will be greatly facilitated if you have three lists: (1) business and professional relations, for example, Social Security, Department of Motor Vehicles, Insurance Policies, Pension, Health Care Providers, Utilities, Credit Cards, Bank Accounts, Investments, Subscriptions, Organizations of which deceased was a member, (2) List of charitable causes supported by the person who has died, (3) Christmas card or letter list.**