

Financial and Legal Details Checklist

Your family members should be aware where these original documents (and copies) are kept. Where appropriate you need to authorize family members to act on your behalf when needed. These are all arrangements one should make while living. By no means is this list complete – use this as a guide.

Also keep in mind, human remains can be buried, entombed, cremated, or donated. Decide your wish and let your family know and update your will accordingly.

Legal Documents to be prepared

Document Type	Notes
Will	
Trust Documents	
Medical Power of Attorney	
Statutory Durable Power of Attorney	
Advance Medical Directive / Living Will	
Out of Office Do Not Resuscitate Form	
Medical Release Form	

You should ensure family members know location of the following documents or relevant details for these items:

Item	Notes
Birth Certificate	
Passport	
Driver's License	
Social Security Card and any benefits information	
Marriage Certificate	
Citizenship papers or residency papers	
Deeds & Titles to Real Property	
Titles and Registrations of Motor Vehicles	
Tax records	
Rental Lease Agreements	
List of logins and passwords for Email and Social Media accounts (Facebook, etc.)	

Security pin for mobile phone	
Safety Deposit box access instructions and list of documents and assets in safety deposit box	
List of assets and how to be distributed (for those not listed in the Will)	
Health insurance Policy	
Life Insurance Policy	
Long Term Care Insurance	
Auto Insurance	
Prepaid Funeral Service Contract	

Account details and Login information for Financial accounts. Make sure you have designated beneficiaries where needed:

Item	Notes/website/username and pwd
Bank Account and Certificates of Deposits (CD's)	
Brokerage Accounts	
Loans – home, auto or personal	

Item	Notes/website/username and pwd
Active or Pending Pensions	
Annuities	
Retirement accounts – 401K or IRA accounts	
Credit Card Accounts	

Contact Details for following:

Item	Contact Details
Employer Contact details	
Family Doctor	
Attorney	
Tax Accountant / CPA	
Landlord	

Account details and login information for various Services and Utilities that may need to be cancelled or modified:

Service	Account Details/Website/Username and pwd
Electric	
Gas	
Water	

Service	Account Details/Website/Username and pwd
Cable, Streaming services	
Internet	
Phone	
Pest Control	
Lawn Services etc.	