

The following list can assist you in organizing legal and other important documents, which will be most helpful to your loved ones. Copy these documents and store them in an envelope, making its whereabouts known to your survivors. Original documents should be stored in a safe place, such as a safety deposit box. Completing a will is an important and relatively simple matter.

- **Last will and testament, its whereabouts and contact numbers for attorney and executor.**
- **Safety deposit key with box number, name and address of bank, contents, and advising who has access.**
- **Instructions to your loved ones, with contact names/numbers of advisors.**
- **Lists of relatives, friends, and significant others.**
- **Funeral or memorial service instructions, including any pre-payment information and the name and location of the funeral home.**
- **Birth certificates: yours, your spouse's, and your dependents.**
- **Marriage certificate or divorce decree or separation agreement.**
- **Social Security card or number.**
- **Military discharge papers or certificate.**
- **Federal and state income tax returns for the last several years.**
- **Insurance policies—health, life, long-term care, auto, property, etc.—including insurance company name, policy number, and beneficiary.**
- **Titles, deeds and leases to all property, e.g. home, auto, RV/boat, real estate.**
- **List of assets and their locations.**
- **List of debts, including outstanding loans, etc.**
- **Bank account names and saving books, with bank contact names/numbers.**
- **Securities and investments: records of trusts, stocks, bonds with broker names/numbers.**
- **Charge account numbers, cards, and statements.**
- **Loans payable and receivable, and any other contracts and agreements to which you are a party, including names, addresses, and conditions of these.**
- **Other business records**
- **Appraisals, receipts, or estimates of valuables**

These documents will be needed after death occurs. After this time, many people choose to retain the services of an attorney or financial advisor. While we can provide some guidance, Casa de la Luz is not able to provide legal advice. Funeral homes provide some information and support, including copies of the death certificate. Usually, 10 to 12 copies are required. After death, notification should be provided to the following:

- **Family members.**
- **Social Security. The eligible surviving spouse or eligible child may receive a small death benefit toward burial expenses or other survivor's benefits.**
- **If the deceased was receiving Social Security, do not cash checks written after the date of their death.**
- **The Veterans Administration, if applicable. Check with the regional VA office for information on benefits available to survivors.**
- **Private pension funds.**
- **Insurance companies.**
- **Other income sources: Annuities, payers of promissory notes.**