

Before you[®] check out

Estate Planning 101: Feb 15 | 10:30am | Ann Premer, Stevens & Brand

**Making A Clean Getaway: A Gift for Your Family | Mar 26 | 10:30am
Margie Coggins & Kathleen Morgan**

HealthCare Advance Planning: Apr 24 | 10:30am | LMH Health

Who Will Tell Your Story? May 22 | 10:30am | Cathy Hamilton

**The End: Burial, Cremation, and Other Options: June 20 | 10:30am |
Todd Miller, Rumsey-Yost**

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MAKING A CLEAN GETAWAY: A GIFT FOR YOUR FAMILY

Checklist for Paying it Forward

Check beneficiaries on all applicable accounts/assets

Items in the Safety Deposit box (or another safe box)

Will and (if applicable) Trust

Living Will*

Power of Attorney for health care*

Advanced medical directives*

Power of Attorney for financial affairs

Social security number or card

List of all passwords

List location of passport/driver's license

Titles for homes and car

Appraisals for jewelry, art, etc.

Birth and marriage certificates

Names of legal guardians for minor children

Divorce papers if applicable

Veterans papers if applicable

Any special instructions: bequests

A cover letter/letter of love and gratitude

Important: Provide the name of the safety deposit box location and where to find the keys. Add someone you trust to the account

**Health care documents should also be available in a readily accessible location.*

Health

Location of insurance cards/driver's license

Medicare: automatically withdrawn from Social Security monthly

Supplemental: (Name carrier) auto withdrawal from account

- List bank, account number, amount, and payment schedule

Prescription Plan: (Name plan) auto withdrawal from account

- List bank, account number, amount, and payment schedule
Dental Plan: (Name your plan) auto withdrawal from account
- List bank, account number, amount, and payment schedule
Primary care doctor: Name, phone, email if applicable
Additional doctors: names, phone numbers, emails
Dentist: Name, phone, email if applicable
Other health care providers: names, phone, emails

Pets

Name/special directions for care
Veterinarian: Name/phone
Guardian name and contact information

Insurance

Home: Provider, agent, and phone number; policy number, payment amount and schedule

Auto: Provider, agent, phone number; policy number, payment amount and schedule. If cars not needed, donate to LPL or KPR

Life and Long Term Care: Provider, agent, and phone number; policy number, payment amount and schedule.

Other: AAA Plus, boats, additional vehicles or homes, storage units

Internet/accounts/passwords

Master login for computer, cell phone, iPad
passwords location or program for passwords

All email accounts, Facebook and other social media, subscriptions to magazines, newspapers, Ancestry and apps

Bank account, investment account

You may wish to name a digital executive to handle all digital information: photos, documents, cell phone information etc.

Home/ Real Estate

Addresses

Mortgage information

Keys: identify/locations, alarm codes

Additional keys: identify/locations (neighbors and others: include names and contacts) Label your keys

Title in safety deposit box: name bank and key location

Keep insurance and utilities going until property is sold

Bank Accounts

Banks: names, addresses, account numbers, type of accounts

Co-owner vs co-signer

Credit Cards/Debit Cards

Names, account numbers, location, bill pay information

Bills

Online bill pay information (utilities, credit cards, etc.) List names, account numbers, login information, how and when paid

Tax Returns

Location of past tax returns

Investments/other income

List location and contact information for the following:

Social Security

IRA's

CD's

Stocks

Retirement accounts

Real estate

Loans to be repaid

Financial planner: name/ contact information

Attorney: name/contact information

Investment broker: name/contact information

- Check beneficiaries on all applicable accounts/assets**

- Memberships**
 - List organizations/payment amount and schedule
 - Subscription auto renewals/ contact information/ date of renewal
 - Frequent flier programs/ names, account numbers
 - Hotel and other reward programs
 - Apps on your phone (Noom, Calm, etc.)
 - TV services: Netflix, Apple TV and other streaming services

- Valuables/appraisals**
 - Jewelry
 - Art work
 - Books and other papers
 - Rugs/furniture

- Family Heirlooms**
 - List with background/current location
 - List of designation for specific items

- Notification of Death**
 - Funeral home: name, contact information
 - List contact for obituary (state wish for print or online only)
 - Copy of obituary if completed - note: obituaries are free in the *Lawrence Times*

- Funeral Plans**
 - Provide your wishes: burial, organ donation, body donation, cremation and directions for remains
 - Church name and contact information
 - State clearly any definite wishes for a memorial or funeral

- Your Personal Message**

You have plenty of time...until you don't

Top 10 First Things to Do at the Time of Death

1. Call a family member or friend to help. Name/phone number
2. Call the most important family and friends. Names/ phone numbers
The person listed in #1 can do this for you.
3. Notify church/pastoral care team if applicable
4. Make arrangements with the funeral home. If you have talked to them ahead of time this is a very easy transition.
5. Request at least 10 copies of the death certificate. Funeral home can help you with this.
6. Call attorney to begin process of settling the will.
7. Set up an appointment with the local social security office and file a claim immediately to avoid possible loss of any benefit checks.
8. Notify insurance companies as applicable
9. Notify employer if applicable.
10. Other: stop or forward delivery of mail, newspapers, etc.

Helpful Resources

Checklist for My Family by Sally Balch Hurme; AARP & American Bar Assn.

Making Things Easy for My Family, Product Concept Manufacturing, Inc.

Read This...When I'm Dead: A Guide to Getting Your Stuff Together for Your Loved Ones by Annie Presley and Christy Howard

Advice for Future Corpses by Sallie Tisdale

Stiff: The Curious Lives of Human Cadavers by Mary Roach

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