**Documents List**

Key documents to organize for your own use, or for others who may need to manage your affairs when you cannot make decisions for yourself or after your death.

1. **MEDICAL INFORMATION** 
   1. Medical Summary – (See *Medical Form Example* on Resource Table)
      1. List of Doctors
      2. List of Current Medications
      3. Pharmacy Location
      4. Insurances, Medicare/Medicaid and Supplemental
      5. Medical Supplies Needed
   2. POLST: Physician Orders for Life-Sustaining Treatment (see form on Resource Table)
   3. Pets – List of Medications, Veterinarian, and Pet Sitter
2. **BANKING AND FINANCIAL INFORMATION**
   1. Location of Safe Deposit Box, Key, and Contents List
   2. INCOME SOURCES
      1. Social Security: Number, Annual Statement
      2. Veterans Benefits
      3. Employer Pension Documents
      4. Wages
      5. Disability
      6. Annuities & Investments
      7. Rent & Royalties
      8. Alimony and/or Child Support
      9. Personal Loans
   3. ASSETS
      1. Bank and Investment Statements
      2. Stocks and Bonds – Location and Purchase Documents
      3. Life Insurance Policies
      4. Prepaid Funeral Arrangements
      5. Real Estate Assessed Values, Timeshare Agreement
      6. Vehicle and Boat Registration(s)
      7. Business Ownership Documents
      8. Valuable personal property appraisals
   4. DEBT
      1. Mortgage Statement
      2. Rental Property Mortgage Statement
      3. Vehicle Loan
      4. Student Loan
      5. Credit Cards (even if zero balance)
      6. Life Insurance Policy Loan
      7. Retirement Plan Loan
      8. Personal Loan
   5. EXPENSES
      1. Mortgage Loan or Rental Agreement
      2. Utilities (Gas, Electric, Phone, etc.)
      3. Insurance Premium Notices
      4. Credit Card Payments
      5. Other Loan Payments
      6. Property Tax Statement
      7. Income Tax (Estimated Payment)
      8. Auto Loan and Maintenance Record
      9. Homeowner Association Dues
      10. Timeshare Fees
      11. Membership Dues
      12. Alimony and Child Support
3. **PEOPLE LISTS**
   1. Short list of key people to call first.
   2. List of people to contact if serious illness or death
   3. List of who knows location of key documents.
4. **IDENTIFICATION & DEATH CERITIFICATE INFORMATION** 
   1. Birth Certificate, Marriage Certificate, Divorce Decree
   2. Social Security Card, Driver’s License or Identification
   3. Medicare Card, Supplemental Insurance Card
   4. Veterans DD214, and Identification Card
   5. Diploma or School Transcripts
   6. Funeral Home Arrangements
      1. *See Funeral Home Arrangements & Needed Information for Death Certificate*
      2. Death Certificate *(See Vital Statistics Form)*
5. **LEGAL DOCUMENTS** 
   1. Will
   2. Durable Powers of Attorney
      1. Financial
      2. Health Care
      3. Health Care Directive
      4. HIPPAA Authorization for access to Medical Information.
   3. Trust Agreements
   4. Death Certificate Information (See *Vital Statistics Form* on Resource Table)
6. **DIGITAL- LOGINS** 
   1. Online Bank Website and Login
   2. Investment Co. Website and Login
   3. Social Media Sites Login
   4. E-mail Account Provider and Login
   5. Online Pharmacy, Online Shopping Site Logins
   6. Online Subscriptions and Game Accounts
   7. My Social Security Login
   8. Pension Account Login
   9. Digital Photo Locations
   10. iTunes Account
   11. iPad, Kindle, Computer Passwords

Source: Ellen M. Bigelow, ChFC®, RICP®, CASL®, EA 921 Lakeridge Way SW, Suite 104, Olympia, WA 98502 BigelowFinancial.com (360) 890-4507 Bigelow Family Financial, LLC 360-890-4507 *Adapted and added to by Martha Worcester* ***October 6, 2018***

**Funeral Home Arrangements &**

**Needed Information for Death Certificate**

Upon your initial visit to the funeral home after the death of a loved one, a funeral director will share a general price list with you. As you are guided through the arrangement process, we work to carefully explain how you can design the arrangements and documents you will need.

Arrangement in advance will make the process easier than if all of this has to be done at the time of death. The arrangement for the funeral or memorial service process may include:

1. Preparing and filing the official death certificate
2. Scheduling the date, location, and time for the service
3. Selecting a casket, urn or other items
4. Preparing an obituary notice
5. Scheduling vehicles
6. Selecting pallbearers
7. Signing necessary authorizations or making arrangements to have them signed by the appropriate individuals

* If you have a favorite song in mind, or want to share photos and other memorabilia, bring them in. A funeral director can help you include these pieces within the service..

**What Information Will the Funeral Director Need?**

Small details can be hard to remember at the easiest of times, never mind after the death of a loved one. This helpful checklist shows what information and items from the deceased will be needed for your meeting with the funeral director:

**Information Needed by The Funeral Home About the Deceased**

**– Bolded** information is required on Death Certificate

Death Certificate is required before body is released for burial or other arrangements

1. **Full legal name and home address**
2. **Social Security number**
3. **Date of birth**
4. **Place of birth**
5. **Father's name**
6. **Mother's maiden name**
7. **Deceased’s State of birth, and place of death**
8. **Veteran's discharge papers (DD-214)**
9. Recent Photograph
10. **Surviving spouse name prior to first marriage**
11. **Highest education**
12. **Occupation**
13. Place of burial (if applicable)
14. Clothing
15. Clergy name and phone number
16. Survivors (name and relationship)
17. Insurance policies (if applicable)

Source: Funeral Alternatives of Washington *with adaptations by Martha Worcester.*

Contact Information: Website [www.FuneralAlterantives.org](http://www.FuneralAlterantives.org) Email [infor@funeralalternatives.org](mailto:infor@funeralalternatives.org)

Phone 360.491.2222. FAX 360.491.9210

Located at 2830 Willamette Dr. NE, Ste G, Lacey, 98516 and other sites throughout the Puget Sound Area.