

I. Documenting a Life

These documents should be organized and accessible. Using this list, put your portfolio of important papers in order for those who will use them at the end of your life or after your death. Make sure documents are clearly identified.

- Will
 - Attorney
 - *Name, Address, Phone, Fax, email*
 - Location of the document
 - Executor / Administrator
 - *Name, Address, Phone, Fax, email*
 - Manner of disposal of personal effects and special possessions
- Certificates
- *Birth*
- *Baptism*
- *Marriage*
- *Divorce, if applicable*
- Military Service, if applicable
- Family History and Genealogy
- Education History
- Employment History
- Residence History
- Taxes
 - *Federal*
 - *State*
 - *Local*
 - *Other*
- Social Security
- Veterans Benefits, if applicable
- Insurance
 - *Health*
 - *Life*
 - *Automobile*
 - *Property*
- Credit / Debit / ATM Cards
- Safe Deposit Box
 - *Location of box*



- *Location of key*
- *Brief description of contents*
- Investments
- Annuities
- Individual Retirement Accounts (IRAs)
- Pensions
- Bank Accounts
 - *Savings*
 - *Certificates of Deposit*
 - *Checking*
- Automobile
 - *Title*
 - *Vehicle Identification Number [VIN]*
 - *License Number*
- Loans
- Mortgage
- Real Estate Ownership
- Citizenship, if naturalized
- Passport
- Organizational Memberships
- Household Inventory
- Allied Service Personnel, for continuity of service
 - *Trades – plumber, electrician, heating, ventilating, air conditioning [HVAC], appliance repair, etc.*
 - *Professional – physicians, dentist, hospital, veterinarian, accountant, financial advisor, banker, attorney, personal representative*
- Funeral Planning
 - *Funeral Home choice or preference*
 - *Funeral Home documents*
 - *Parish choice or preference*
 - *Funeral Rites documents*
- Burial Planning
 - *Cemetery choice or preference*
 - *Burial Space Documents*
 - *Memorialization choice*
 - *Pre-payment of burial service fee, if applicable*

