



Strength  
at Your Side

# Preparing for a death

*Adapted from Final Business, by Marty Hogan, LCSW, MSW*

It can be overwhelming to think about all of the tasks that come along with planning for a death. The following worksheet is intended to help initiate some of those difficult conversations, and assist in identifying, locating, and organizing pertinent information.

My full name: \_\_\_\_\_

Date of birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Place of birth: \_\_\_\_\_

My mother's name (First, Middle, Last): \_\_\_\_\_

My father's name (First, Middle, Last): \_\_\_\_\_

## LOCATION OF:

• Birth certificate: \_\_\_\_\_

• Marriage certificate: \_\_\_\_\_

• Social Security Card: \_\_\_\_\_

• Divorce documents (if applicable): \_\_\_\_\_

• My Will: \_\_\_\_\_

• Important financial information (titles, deed, mortgage, etc.): \_\_\_\_\_

• Safe deposit box, number, and key: \_\_\_\_\_

• Memberships/Subscriptions: \_\_\_\_\_

• Medicare/Medicaid/Insurance documents: \_\_\_\_\_

• PO Box number and location (if applicable): \_\_\_\_\_

My attorney is (name and phone number): \_\_\_\_\_

Life insurance company and policy number(s): \_\_\_\_\_

Accountant's name and phone number: \_\_\_\_\_

Name of my bank(s) and location of account numbers: \_\_\_\_\_

Funeral Home (name and phone number): \_\_\_\_\_

Funeral arrangements have been made and paid for (yes/no): \_\_\_\_\_

My wishes are (to be buried, cremated, other, list any additional wishes you have): \_\_\_\_\_

My church leader's name: \_\_\_\_\_

Religious sacraments I have, or would like to receive: \_\_\_\_\_

Veteran discharge number: \_\_\_\_\_

Location of discharge papers: \_\_\_\_\_

**1. The Last Will and Testament-** delegates who will receive which assets and appoints an executor for the estate and/or names a guardian for minor children. Meet with an attorney to begin this process as early as possible. Know the location of your loved one's Will as it may be more difficult to access after the death.

**2. Durable Power of Attorney for Finances and Durable Power of Attorney for Health Care-** These are 2 separate documents. Each delegates someone to make decisions for another person while that person is still alive. The power of attorney becomes ineffective after death.

**3. Authorization for final disposition-** delegates someone to make funeral arrangements after the death has occurred. This is available online.

**4. Important papers and information to collect**

- a. Social Security Card and Medicare Card (if applicable) - May be needed to apply for survivor benefits. This number will also be located on the death certificate.
- b. Life insurance carrier, documents, and policy number - Review coverage and possible need for changes.
- c. Pension and Annuity accounts - Know location and where they originated.
- d. Bank and credit card accounts/investments - If possible, prior to death, list another person on all accounts to avoid accounts going through probate. It is much more difficult to gain access to an account after your loved one has died.
- e. Titles of properties/vehicles - Know what they are for and where they are located. It may be beneficial to list another person on the titles.
- f. Birth certificates - May be required for dependents to apply for survivor benefits.
- g. Marriage certificates - Surviving spouses may need this to apply for social security survivor benefits.
- h. Military discharge papers (DD214) - may need these to apply for benefits and financial or burial assistance as well as a military funeral. Contact the Veteran's county of residence Veterans Service Officer to obtain a copy. You can find each county listed online at [wicvso.org](http://wicvso.org), click on "Locate your CVSO", Click on the Veteran's county of residence.



- i. Outstanding bills, mortgages, or other loans
  - j. Income tax returns - required for estate taxes
  - k. Health, automobile, and other insurance- It is important to review and revise as changes to beneficiaries or types of coverage may need to occur.
- 5. Funeral planning-** Talk to your loved one and determine which funeral home is preferred. Contact that funeral home for more information. Many people find comfort in taking part in this process prior to their death. This may also be a good time to address the obituary as well.
6. It may be helpful to **have your loved one's mail redirected** to another family member or trusted friend as their disease progresses or when the death occurs.
7. After the death, it is advised that family members **collect several death certificates** as they are often required to access bank accounts, life insurance, pensions, social security policies, etc.
- 8. Consider completing a legacy activity.** These can take on many different forms and are unique to each individual. Some ideas include:
- beginning a journal for loved ones to read
  - write letters to loved ones
  - create a scrapbook or photo album
  - make an audio or video recording
  - complete a purchased legacy or life review book (these can be found in many bookstores)
  - complete a legacy worksheet (either by creating your own, or researching legacy worksheets online), etc.
- The activities are endless and can be tailored to fit any creative, functional, or cognitive level.

Call Unity 24/7 at **920.338.1111** or **800.990.9249**

If there is no answer and the phone continues to ring, call **920-490-7418**.