Over65FinalExpense

FREE CHECKLIST

The family file: papers, policies and wishes in one place

Where it is, who knows, and what you want, in one place

Write where each item is kept, not the numbers inside it. Keep the page with your other important papers and tell one person where it is.

Papers to gather

- [ ] Photo ID and birth certificate
- [ ] Marriage certificate, divorce decree or a spouse death certificate
- [ ] Military discharge papers (DD 214), if you served
- [ ] Will, power of attorney and health care directive
- [ ] Life insurance policy and its beneficiary form
- [ ] Prepaid funeral or burial contract, if any
- [ ] Deeds, vehicle titles and recent tax return
- [ ] Medicare and Social Security card locations (do not copy the numbers here)

Where each one is kept

Will and legal papers

Life insurance policy and beneficiary form

Funeral or burial contract

General education, not insurance, legal or tax advice. Figures are examples unless a source is named. Prices and rules vary by state and insurer.

Bank and account list (names only)

Password manager or safe

People to tell

Who	Name	Phone
Person who knows where this file is		
Executor or personal representative		
Insurance agent or company		
Preferred funeral home		
Clergy or celebrant		

Your wishes

- [ ] Burial
- [ ] Cremation
- [ ] No preference, family decides

Place or kind of service

Music or readings

Who should speak

Where to send memorials

> Never write passwords, full account numbers or your Social Security number on this page.

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Review once a year

- [ ] Beneficiary names still right?
- [ ] Policy premium still affordable?
- [ ] Contact names and phone numbers still right?
- [ ] A second person knows where this file is?

Sources

- FTC: Shopping for Funeral Services
  consumer.ftc.gov/articles/shopping-funeral-services
- Social Security: Survivor benefits
  www.ssa.gov/benefits/survivors/

Want a price for a small policy? See over65finalexpense.com/quote.

over65finalexpense.com/quote or call (888) 635-3511

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