

Helpful Information Prior to Death

Things to Do in Preparation

- Complete and/or locate important documents like Last Will and Testament, Living Will, Durable Power of Attorney, Military Discharge Papers, Social Security Cards, Marriage License, Birth Certificate.
- Locate life insurance policies to find out amount of insurance and beneficiaries on policies.
- Locate car titles and real estate deeds.
- Arrange for care of pets.
- Discuss wishes for final arrangements: burial, cremation, body donation, choice of funeral home and services.
- List bank accounts and other financial records. If the patient is only “owner” of a bank account, it will likely be frozen.
- List online accounts such as email, Facebook, banking, etc. and passwords
- Locate safety deposit box and keys, along with information about ownership and access.
- Address any fiduciary responsibilities the patient may hold so other arrangements can be made- example may be POA, payee for Social Security, guardianship.
- Gather information- names/relationships, military history, work history, memberships of organizations, etc. for obituary.

Helpful Phone Numbers:

Social Security 1-800-772-1213

Veteran’s Administration 1-800-827-1000 or www.va.gov