

# ESTATE MANAGEMENT CHECKLIST

## GETTING YOUR AFFAIRS IN ORDER

No one ever plans to get sick or disabled. Yet, it's just this kind of planning that can make all the difference in an emergency or death. There are many different types of legal documents that can help you plan how your affairs will be handled in the future. It can also relieve the caregiver's burden at such a difficult time.

It is always important to keep your information in a safe and secure location. Make sure to tell the appropriate person where this information is located. Be especially careful with whom you disclose this information to! You do not want this sensitive information to get into the wrong hands.

COMPLIMENTS OF THE:

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## PIKE COUNTY ELDER TASK FORCE AND

**Monroe, Pike and Wayne County LINK Program**

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IN COLLABORATION WITH THE PENNSYLVANIA DEPARTMENT OF AGING

## **CHECK LIST OF DOCUMENTS TO CONSIDER**

	<b>Will</b>
	<b>Letter of Instruction</b>
	<b>Trust Documents</b>
	<b>House Deed/ Land Deed</b>
	<b>Cemetery Deed</b>
	<b>Escrow/ Mortgage Accounts</b>
	<b>Proof of Loans/ Debts Owed</b>
	<b>Vehicle Titles</b>
	<b>Stock Certificates</b>
	<b>Bond Certificates</b>
	<b>Brokerage Accounts</b>
	<b>Business / Partnership Agreements</b>
	<b>Tax Returns</b>
	<b>List of Bank Accounts</b>
	<b>List of User Names/ Passwords</b>
	<b>List of Safe Deposit Boxes/ Locations</b>
	<b>Organ Donation Document</b>
	<b>Family/ Personal Medical History</b>
	<b>Durable Health Care</b>
	<b>Power of Attorney</b>
	<b>Authorization to Release medical information</b>
	<b>Living Will</b>
	<b>Do Not Resuscitate Order</b>
	<b>Marriage License</b>
	<b>Divorce Decree</b>
	<b>Arrangements for Pets</b>
	<b>Inheritance Due to You</b>
	<b>List of Doctors, Attorneys, Brokers, ect.</b>
	<b>Funeral Arrangements</b>
	<b>Birth Certificate/ Social Security Card</b>
	<b>Veterans Benefits</b>
	<b>Life Insurance Policy</b>
	<b>Retirement Plan</b>

## **SURVIVORS- WHAT SHOULD YOU DO**

### **FIRST- INITIAL ARRANGEMENTS AND DECISIONS**

	<b>WHICH FUNERAL DIRECTOR</b>		<b>PALLBEARERS</b>
	<b>WHAT BURIAL LOCATION</b>		<b>TRANSPORTATION FOR FAMILY</b>
	<b>TYPE OF MEMORIAL SERVICE</b>		<b>NEWSPAPER NOTIFICATION</b>
	<b>CASKET, VAULT OR CRYPT</b>		<b>CHECK WILL FOR SPECIAL REQUEST(S)</b>
	<b>WHICH CLERGY FOR CEREMONY</b>		<b>ORDER DEATH CERTIFICATE(14)</b>
	<b>TIME AND PLACE OF SERVICES</b>		<b>COMPILE A THANK YOU LIST</b>
	<b>CLOTHING FOR DECEASED</b>		<b>GREET ALL FRIENDS AND RELATIVES</b>
	<b>TIME OF FUNERAL SERVICES</b>		<b>SPECIAL SELECTION FROM SCRIPTURE</b>
	<b>MUSIC AND FLOWERS</b>		<b>PROVIDING LODGING FOR OUT OF TOWN RELATIVES</b>
	<b>INFORMATION FOR THE ULOGY</b>		

### **SECOND- NOTIFICATIONS**

	<b>DOCTOR(S)</b>		<b>ATTORNEY</b>
	<b>FUNERAL DIRECTOR</b>		<b>ACCOUNTANT OR EXECUTOR OF ESTATE</b>
	<b>CEMETARY</b>		<b>INSURANCE AGENTS</b>
	<b>RELATIVES AND FRIENDS</b>		<b>VETERAN'S ORGANIZATIONS</b>
	<b>EMPLOYER OF DECEASED</b>		<b>CIVIC GROUPS</b>
	<b>NEWSPAPER NOTICES</b>		

### **THIRD- SECURE VITAL STATISTICS**

	<b>NAME, ADDRESS, ZIP</b>		<b>PLACE OF BIRTH</b>
	<b>PHONE NUMBER</b>		<b>WAR VETERANS SERIAL NO.</b>
	<b>OCCUPATION AND TITLE</b>		<b>FATHERS NAME</b>
	<b>HOW LONG IN STATE</b>		<b>FATHERS BIRTHPLACE</b>
	<b>SOCIAL SECURITY NUMBER</b>		<b>MOTHER MAIDEN NAME</b>
	<b>DATE OF BIRTH</b>		<b>MOTHERS BIRTHPLACE</b>

### **FOURTH- COLLECTED DOCUMENTS**

	<b>WILL</b>		<b>BANK BOOKS</b>
	<b>LEGAL PROOF OF AGE</b>		<b>DEEDS TO PROPERTY</b>
	<b>SOCIAL SECURITY CARD</b>		<b>BILL OF SALE OF VEHICLE</b>
	<b>MARRIAGE LICENSE</b>		<b>INCOME TAX RETURNS</b>

	<b>CITIZENSHIP PAPERS</b>		<b>DISABILITY CLAIMER</b>
	<b>INSURANCE POLICIES</b>		<b>VETERAN'S DISCHARGE PAPERS</b>

## **FINALLY- FINANCIAL OBLIGATIONS**

	<b>FUNERAL DIRECTOR</b>		<b>DOCTORS AND NURSES</b>
	<b>MEMORIALS</b>		<b>MEDICINE AND DRUGS</b>
	<b>FLORIST AND CLERGY</b>		<b>OTHER CURRENT &amp; URGENT</b>
	<b>HOSPITAL AND AMBULANCE</b>		<b>BILLS (MORTGAGE, RENT, TAXES, ECT)</b>

## NOTES

[illegible]