



Strategic Planning for End of Life

Date _____

Based on materials created by the Georgia Department of Human Resources, TIAA/CREF, *When I'm Gone* by Kathleen Fraser, and other materials gathered by the Morning Glories Small Group Ministry

The following information would be helpful for those in your life who survive past your death. Gather as much as you can, make and provide copies to appropriate persons, and keep in an agreed upon location, preferably in a fireproof box.

Contact Information

Use this section to identify whom to contact after your death. Include information such as name, relationship, phone number, email address.

- Power of Attorney for finances _____

- Power of Attorney for health _____

- Attorney _____
- Executor of your will _____

- Family members

- Friends

- Religious community _____

- Employer/Volunteer Organizations

- Social Security Administration – local office must be notified

- Financial Advisor _____

Documents and Records

Include location, identifying account numbers if appropriate, names of individuals associated with these records if appropriate.

- Last Will and Testament

- Social Security Number

- Birth Certificate

- Marriage Certificate/Divorce or Separation Papers

- Insurance Policies

- Financial Investments and Bank Accounts

- Trust

- Real Estate

- Safe Deposit Box/Key

- Property Deeds/Information

- Credit Cards

- Most Recent Tax Returns

Funeral Arrangements

- Have you made arrangements? If so, where is this information? Or, list them here.

- Death Certificate. It is essential to obtain multiple official copies of the death certificate. Copies will need to be sent to all insurance companies as well as other persons.