

*Circle Of Life: Cancer Education and Wellness*

*for American Indian and Alaska Native Communities*

**Appendix C: Personal Affairs Worksheet**

You can fill out this worksheet to help your family deal with your personal affairs after you're gone. Be sure to let your loved ones know about this list. Try to keep it up to date and in a safe place. Make sure that only those you trust have access to it.

**Banks, savings and loans**

Contact information

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What needs to be done

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**Life insurance company**

Contact information

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What needs to be done

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**Health insurance company**  
Contact information

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What needs to be done

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**Disability insurance company**  
Contact information

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What needs to be done

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**Homeowners' or renters' insurance company**  
Contact Information

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What needs to be done

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**Burial insurance company**  
Contact information

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What needs to be done

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**Unions and fraternal organizations**  
Contact information

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What needs to be done

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**Attorney**  
Contact information

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What needs to be done

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**Accountant**

Contact information

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What needs to be done

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**Executor of the estate**

Contact information

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What needs to be done

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**Tax returns and monetary records/Internal Revenue Service**  
Where are documents located/contact information

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What needs to be done

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**Social Security office**  
Contact information

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What needs to be done

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**Pension or retirement plans**

Contact information

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What needs to be done

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**Department of Veterans Affairs**

Contact information

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What needs to be done

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**Investment companies**  
Contact information

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What needs to be done

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**Mortgage companies**  
Contact information

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What needs to be done

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**Credit card companies**  
Contact information

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What needs to be done

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**All other lenders**  
Contact information

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What needs to be done

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**Employer**

Contact information

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What needs to be done

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**Faith or spiritual leader/organization**

Contact information

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What needs to be done

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**Safety deposit box keys and box location**

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**Safe, lock combinations**

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**Location of will and other important items (such as jewelry)**

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