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

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

What needs to be done
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

**Life insurance company**
Contact information
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

What needs to be done

Nearing the End of Life- Rev. 10.8.15
Health insurance company
Contact information

What needs to be done

Disability insurance company
Contact information

What needs to be done
Homeowners’ or renters’ insurance company
Contact Information

What needs to be done

Burial insurance company
Contact information

What needs to be done
Unions and fraternal organizations
Contact information

What needs to be done

Attorney
Contact information

What needs to be done

Nearing the End of Life- Rev. 10.8.15
Accountant
Contact information

What needs to be done

Executor of the estate
Contact information

What needs to be done
Tax returns and monetary records/Internal Revenue Service
Where are documents located/contact information

What needs to be done

Social Security office
Contact information

What needs to be done
Pension or retirement plans
Contact information

What needs to be done

Department of Veterans Affairs
Contact information

What needs to be done
Investment companies
Contact information

Mortgage companies
Contact information

What needs to be done
Credit card companies
Contact information

What needs to be done

All other lenders
Contact information

What needs to be done
Circle Of Life: Cancer Education and Wellness

for American Indian and Alaska Native Communities

Employer
Contact information

What needs to be done

Faith or spiritual leader/organization
Contact information

What needs to be done
Safety deposit box keys and box location

Safe, lock combinations

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