

## BEFORE DEATH DOCUMENT CHECKLIST:

Here is a checklist of documents to compile before passing away.  
Share the location of the documents with appropriate people.

- Will or trust agreements
- Durable power of attorney for health care
- Marriage certificates
- Divorce certificates and agreements
- Birth Certificate
- Social Security card
- Military service records and discharge papers
- Veteran benefits
- Government benefits
- Tax returns (last 7 years)
- Life insurance policies
- Car insurance
- Homeowners insurance
- Health insurance
- Mortgages
- Account usernames and passwords – Email, financial, social media, devices
- Deeds
- Leases
- Motor vehicle titles
- Recreational vehicle titles
- Financial institution statements
- Loan statements
- Investment account statements
- Stock certificates
- Pension/retirement plan statements
- Employer benefit statements
- Bills, Including automated payments
- Safe deposit box information, including keys
- Storage locker contract
- Business ownership or interest