

Sudden Death Checklist

Yes	
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Personal and Family Information

Your name:
Your date of birth:
Home address:
Home telephone: Email:

Do you know where your Social Security card is?	
Do you have a passport?	
If yes, do you know when it expires?	
If yes, do you know where it is?	
Do you have any scars or birthmarks that could identify you if necessary?	

Spouse's name:
Spouse's date of birth:

Do you know where your spouse's Social Security card is?	
Does your spouse have a passport?	
If so, do you know its number?	
If yes, do you know when it expires?	
If yes, do you know where it is?	
Does your spouse have any scars or birthmarks that could be used for identification?	
Are you a US citizen?	

If not, of what country are you a citizen?	
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Is your spouse a US citizen?	
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If not, of what country is your spouse a citizen?	
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Do you have any prior spouse?	
Is s/he still living?	

Current address and phone:	
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Do you have a copy of the divorce decree from that prior marriage?	
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Your child:

Name:	
Date of birth:	

Does your child have a SSN?	
If yes, do you know where the card is?	
Does your child have a current passport?	
If yes, do you know its number?	
If yes, do you know where the passport is?	
Does this child have any scars or birthmarks that could be used for identification?	

Personal data	
Is this child from previous marriage?	
Is this child adopted?	
Is this child deceased?	

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Your child:

Name:	
Date of birth:	
Does your child have a SSN?	<input type="checkbox"/>
If yes, do you know where the card is?	<input type="checkbox"/>
Does your child have a current passport?	<input type="checkbox"/>
If yes, do you know its number?	<input type="checkbox"/>
If yes, do you know where the passport is?	<input type="checkbox"/>
Does this child have any scars or birthmarks that could be used for identification?	<input type="checkbox"/>
Personal data	
Is this child from previous marriage?	<input type="checkbox"/>
Is this child adopted?	<input type="checkbox"/>
Is this child deceased?	<input type="checkbox"/>

Your child:

Name:	
Date of birth:	
Does your child have a SSN?	<input type="checkbox"/>
If yes, do you know where the card is?	<input type="checkbox"/>
Does your child have a current passport?	<input type="checkbox"/>
If yes, do you know its number?	<input type="checkbox"/>
If yes, do you know where the passport is?	<input type="checkbox"/>
Does this child have any scars or birthmarks that could be used for identification?	<input type="checkbox"/>
Personal data	
Is this child from previous marriage?	<input type="checkbox"/>
Is this child adopted?	<input type="checkbox"/>
Is this child deceased?	<input type="checkbox"/>

Do you or any family member have serious long-term medical or physical problems that will require special attention in the future?

If yes, please list the person(s) and the long-term medical or physical problem:	

Online Passwords

Do you have a current file with all of your online passwords?	
Does anyone else have access to that file?	

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Family Financial Assets

Personal residence

Address:
Property description (e.g. single family, condo, co-op)

- Joint tenancy with right of survivorship?
- Tenancy by the entirety?
- Tenancy in common?
- Husband's name only?
- Wife's name only?
- Land trust?

Fair market value estimate: \$	
Mortgage balance: \$	
Mortgage life insurance?	

Other personal residences or vacation homes:

Address:
Property description (e.g. single family, condo, co-op)

How do you hold the title:

- Joint tenancy with right of survivorship?
- Tenancy by the entirety?
- Tenancy in common?
- Husband's name only?
- Wife's name only?
- Land trust?

Fair market value estimate: \$	
Mortgage?	
If yes, what is the approximate balance?	

If yes, do you know who holds the mortgage?

Mortgage life insurance?

If yes, do you have the company contact info at hand?

Automobiles

- Do you know where the title is for each vehicle?
- Do you know where the policy is & whom to contact?
- Do you have your agent's current contact info?
- Do you know the approximate value of each vehicle?
- Do your children have driver's licenses?
- If so, do you pay their auto insurance?

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Household Effects (furniture, furnishings, books, pictures)

- Do you know approximate value of household effects?
- Do you know if those household effects are insured?
- If so, do you know where the policy is?
- If so, do you have agent's current contact information?

Valuable Jewelry

- Do you have an itemized list of valuable pieces?
- Do you have photographs of each piece?
- If so, where are the photographs kept?
- Do you have separate insurance for those pieces?
- If so, do you know where the policy is?
- If so, do you have agent's current contact information?
- In the event of your death, do you know to whom you would gift these pieces of jewelry?
- If yes, are those wishes documented in your will or trust?

Valuable Works of Art

- Do you have an itemized list of valuable pieces?
- Do you have photographs of each piece?
- If so, where are the photographs kept?
- Do you have separate insurance for those pieces?
- If so, do you know where the policy is?
- If so, do you have agent's current contact information?
- In the event of your death, do you know to whom you would gift these pieces of art?
- If yes, are those wishes documented in your will?

Valuable Antiques

- Do you have an itemized list of valuable pieces?
- Do you have photographs of each piece?
- If so, where are the photographs kept?
- Do you have separate insurance for those pieces?
- If so, do you know where the policy is?
- If so, do you have agent's current contact information?
- In the event of your death, do you know to whom you would gift these antiques?
- If yes, are those wishes documented in your will?

Other Valuable Collections (Coins, Stamps, Gold, etc.)

- Are these valuables insured?
- If so, by whom?
- Is there a written inventory of this property?
- If so, when was it last updated?
- If so, do you know where the inventory is?

Other Tangible Property (Cash, cash deposits, cash equivalents)

- Do you know how much cash you have on hand?
- Do you know where the cash is kept?

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Banks and Other Institutions

Checking and/or Money Market Accounts

- Do you know the approximate balance in the account(s)?
- Do you know the account numbers for each account?
- Do you have copies of your most recent statements?
- Do you know which of these accounts are held jointly?

Ordinary Savings Accounts

- Do you know the account numbers for each account?
- Do you know the approximate balance in the account(s)?
- Do you have copies of your most recent statements?
- Do you know which of these accounts are held jointly?

Certificates of Deposit

- Do you know the maturation date of each CD?
- Do you know the approximate value of each CD?

Short-term U.S. Obligations (T-Bills)

- Do you know the maturation date of each T-Bill?
- Do you know the approximate value of each T-Bill?

Retirement Plans

IRAs

- Do you have individual IRAs?
 - Do you know the account numbers for each account?
 - Do you know the approximate balance in the account(s)?
 - Do you have copies of your most recent statements?
 - Do you know which of these accounts are held jointly?
- Does your spouse have separate IRAs?
 - Do you know the account numbers for each account?
 - Do you know the approximate balance in the account(s)?
 - Do you have copies of the most recent statements?
 - If so, do you have the account number for it?
 - Do you have the contact information for the plan manager?

Pension & Profit-Sharing Plans

- Is your spouse vested in a pension or profit-sharing plan?
 - If so, do you have the account number for it?
 - Do you have the contact information for the plan manager?
- Do you or your spouse have other tax-qualified employee benefit plans?
 - If so, do you have the account number for it?
 - Do you have the contact information for the plan manager?

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Trusts

Have you created any trusts?

If so, are you the trustee?

If so, do you clearly understand your fiduciary responsibilities as a trustee?

Do you have a plan for educating the beneficiaries of your trust(s) about their rights and responsibilities as beneficiaries?

If you are not the trustee, do you understand the role and responsibilities of your trustee?

Do you know what your trustee charges?

Are you the beneficiary of any trusts?

If so, do you understand your rights and responsibilities as a beneficiary?

Do you meet regularly (once a quarter or more frequently) with the trustee(s) to discuss your short and long-term plans?

Philanthropic Investments

Do you have a family foundation or supporting organization or donor-advised fund?

If so, do you serve on its board of directors or advisors?

Does the foundation have written vision and mission statements?

No

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No

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No

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No

No

No

No
