

# St. Paul's Church

UNITED METHODIST

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## IMPORTANT INFORMATION

Name \_\_\_\_\_ Today's Date \_\_\_\_\_

Below is important information that you will need to know in the event of my incapacitation or death.

### My Living Will and Power of Attorney

Location of a Copy of My Living Will / Do Not Resuscitate Order / HIPPA Release (address, if needed)	
Name, Address, Phone # and Email Address of My Financial Power of Attorney	
Name, Address, Phone # and Email Address of My Durable Power of Attorney for Healthcare	

### My Last Will and Testament / Living Trust

Location of a Copy of My Last Will & Testament (address, if needed)	
Name, Address, Phone # and/or Email of My Attorney	
Location of a Copy of My Living Trust	
Name, Address, Phone # and/or Email of My Designated Agent for After-death Arrangements	

**Special Instructions for Pet(s):** \_\_\_\_\_

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**My Insurance Policies (Life, AD&D, Veterans, Funeral, Health, Property, etc.)**

<b>Policy Company</b>	<b>Address / Phone # of Policy Agency or Agent</b>	<b>Policy Number</b>

**Location of Other Important Papers and Items**

Birth certificate / Social Security Card or Number	
Marriage (and/or Divorce) Certificate; Domestic Partnership Registration	
Passport	
Military Service Papers	
Retirement / Pension	
Property Deeds	
Automobile and Other Vehicle Title(s)	

Copies of Keys to House(s), Vehicles, Safe Deposit Box, Other (are they labeled?)	
Who already has Keys to your house? Hidden keys - locations?	
Access Code(s) to House, Alarm, Garage	
Location of Second Home / Other Property and Access Codes / keys	
Safe Combination	
Gun Cabinet (key or combination)	

### My Credit Cards

Credit / Debit Card	Contact Information	Credit / Debit Card Number, PIN # (if needed)

### My Financial Information

Bank Name	Location / Bank Branch / Contact Info	Account Number / PIN #
Savings Account		

Checking Account #1		
Checking Account #2		
Safe Deposit Box		
Other Bank Accounts:		
Mortgage		
Home Equity or Other Line of Credit		
Other Loans:		
Investment / Brokerage Accounts		
Stocks and Bonds		
Annuities		

**Name and Contact Information for My Financial Advisor / Financial Planner:**

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**Automated Bill Payments**

<b>Company (e.g. Utility, Phone, Bank, Mortgage Company)</b>	<b>Auto-deducted from: (e.g., checking account #1, savings account)</b>	<b>Frequency (e.g., On the 15<sup>th</sup> of each month, once a year in December)</b>




**The Location of:**

<b>Item</b>	<b>Location</b>	<b>Notes (if needed)</b>
Pre-paid Funeral Contracts		
Favorite Recipes		
Family Heirlooms		
Income Tax Returns / Records		
Property Tax Records		
Loan Papers		



Location of Electrical Breaker		
Location of Water Main		
Location of Gas Main		
Preferred Plumber		
Preferred Electrician		
Preferred Handyman		
Instructions for Air Conditioning and Heating		
Preferred Mechanic Vehicle: _____		
Preferred Mechanic Vehicle: _____		
Insurance Agent		
Preferred Car Salesperson		
Preferred Lawn Care		
Preferred Fireplace Maintenance		
Preferred Painter		
Preferred Lawyer - Estate		
Preferred Lawyer - Defense		
Water Softener Salt		
Preferred Real Estate Agent		
Preferred Contractor		




**People to Call to Share News of My Death:**

<b>Who Is This?</b>	<b>Name(s)</b>	<b>Phone # / Email</b>
Funeral Director		
Family Physician		
Employer(s):		
Church / Pastor		
Specific Family Members (who can pass on the information):		
Specific Friends:		
Caregivers (e.g., Visiting Nurse, etc.)		
Childcare Providers:		
Child's School Counselor(s)		
Financial Advisor		
Post Office (to forward mail, if necessary)		

Cancel Services No Longer Needed (Email, phone, etc.)		
Social Security (unless contacted by the Funeral Director)		
Insurance Companies		
Banks, Financial Institutions, Credit Cards		
The Three Main Credit Bureaus		

**ADDITIONAL INSTRUCTIONS / NOTES:**