

My Life Dossier



A Resource for Getting Your Affairs in Order

Keep this document in a safe place, but accessible by trusted loved ones should an emergency occur.

This resource was compiled by Avow. The information in this document is not intended as legal or financial advice. For legal or financial advice, please consult an attorney, certified public accountant or financial advisor.

My Life Dossier

A resource for getting your affairs in order

Accidents and emergencies happen. Regardless of your age, getting your affairs in order should be on the top of your to-do list. Use this resource to help you organize important documents and to pre-plan for emergencies and your final life chapter. Life and priorities change... review the information noted in your dossier at least annually to update and revise as needed. This is especially important when you move, travel or have major medical procedures planned.

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Section 1: Get Organized

Personal Identifying Information

My Name: _____

Other/Maiden Names/Aliases: _____

Address: _____

Street

Apt.

City

State

Zip Code

Seasonal Address:

Street

Apt.

City

State

Zip Code

Social Security Number: _____

Driver's license number and issuing state: _____

Special vehicle License numbers: _____

Career-related license numbers: _____

Note applicable identification numbers and location of documentation for:

- Birth certificate
- Marriage license
- Divorce decree
- Resident Alien Registration/Card Information (if not a US citizen)
- Passport

Health Care Information

Family Doctor:_____

Address/contact number:_____

Specialists:_____

Address/Contact number:_____

Dentist:_____

Address/Contact number:_____

Organ donation preference & location of donor card:

Practical Matters

Note account numbers and contact information for the following:

- Utilities (electric, gas, water, refuse)
- Cable
- Internet providers
- Phone service (cell & land lines) - note phone number assignments
- Homeowner Association
- Home security company
- Property management / contracted service providers

Pet Care

Pet name/breed:_____

Pet name/breed:_____

Pet name/breed:_____

Veterinarian:_____

Address/contact number:_____

Boarding/pet care services:_____

Address/contact number:_____

Legal Advisors

Family lawyer/attorney: _____

Address/contact number:_____

Other legal advisors:_____

Address/contact number:_____

Other legal advisors:_____

Address/contact number:_____

Financial advisor/planner/stockbroker:_____

Address/contact number:_____

Accountant/tax preparation:_____

Address/contact number:_____

Insurance agent(s):_____

Address/contact number:_____

Legal Documents/Data

Note location of official documentation related to:

- Tax Records (retain copies of returns from past three years)

- Advance Directive / Living Will

- Child custody papers

- Prenuptial/nuptial agreements

- Trust data

- Last Will & Testament/final letter of instruction

- Binding contracts

- Education records

- Employment records

- Planned funeral documents

Power of Attorney / Durable Power of Attorney: _____

Address/contact number: _____

Healthcare surrogate: _____

Address/contact number: _____

Personal representative for my estate: _____

Address/contact number: _____

Location of safety deposit box: _____

Box number _____ Key location: _____

Other names assigned to box: _____

Contents:

Insurance

Note ID number, details and location of official documentation related to:

- Health insurance information

- Long-term care insurance

- Life insurance policies

- Medicare/Medicaid Identification

- Homeowner insurance

- Vehicle insurance

- Pet insurance

- Other

Military Data

If you are in active duty, note military branch assignment and appropriate contact information.

If you are a Veteran, note years of service and location of official discharge papers and other military service-related information.

Career/Community Affiliations:

List membership such as labor unions, clubs, professional associations, fraternities, etc. Include contact information where applicable. *Make note of any affiliations that will provide benefits including death or cemetery benefits.*

Proof of Ownership Documentation

List items that you possess and location of ownership documentation such as titles. Examples include homes, automobiles, boats, timeshares, businesses.

List information about any rental/leasing agreements and note location of documentation.

You may wish to compile a household inventory, including appraisal records. If you own patents and/or copyrights, note details.

Financial Data

Document institution name(s), address(es) and account numbers and location of any documentation. *Make notation on any accounts that have joint signature status or have other authorized users. Also note which accounts are managed on-line.*

- Bank account(s)

Checkbook(s) - note which account and where it is located.

- Mortgage account(s)

- Credit card account(s)

- Annuities

- Retirement accounts

- Pension accounts

- Stocks & bonds

- Other accounts

On-line Accounts / Password Information

Remember to chart banking accounts, utility accounts, credit card accounts, social media accounts, on-line retail and any other on-line accounts you may have.

Notate accounts and passwords below:

Section 2: In Case of an Emergency

Remember to have this information easily accessible when you are traveling, having major surgery, etc. Keep a copy with you when you travel and leave a copy behind with a family member or friend.

Emergency Contacts

Name: _____

Address: _____

Phone number(s): _____

Relationship: _____

Special comments: _____

Name: _____

Address: _____

Phone number(s): _____

Relationship: _____

Special comments: _____

Name: _____

Address: _____

Phone number(s): _____

Relationship: _____

Special comments: _____

Make a notation if contact also serves as your health care surrogate, power of attorney, or personal representative for your estate, etc.

Other items to keep accessible in case of an emergency:

- Health insurance details
- Living Will documents
- Health Care Surrogate or Health care Power of Attorney contact information
- Family physician contact information

A note about Living Wills and Health Care Surrogates...

A Living Will (Advance Directive) is used to address your intentions for withdrawing or withholding life prolonging procedures in the event that you have a terminal condition, end-stage condition or are in a persistent vegetative state. A Living Will is not put into effect unless and until you are determined to be incompetent to exercise or express your wishes.

As part of your Advance Directive you will need to designate someone to carry out the provisions of your Living Will/Advance Directive plan. This person is typically referred to as a health care surrogate*. The person you name as your health care surrogate should clearly understand your wishes and be willing to accept the responsibility of making medical decisions on your behalf.

If you have a Living Will, be sure to give a copy to your physician, family members and your health care surrogate or other designee. Review your Living Will annually!

**A health care surrogate is not the same as a health care power of attorney. When you have assigned a health care power of attorney, that person or entity is authorized to make a wide variety of medical care decisions for you such as admission to nursing facilities, medical, surgical and/or therapeutic procedures, etc.*

Other Notes:

Section 3: Planning My Final Chapter

Last Will & Testament

This written document describes the ways in which real and/or personal property is to be transferred and to whom. If you have minor children, your will can include guardian designation for surviving children.

When drawing up a will you must 1) determine what you own as real and personal property, 2) decide how you want your property to be distributed, 3) specify someone to oversee the transfer of your property and guardianship of your minor children.

If you have a pet, consider including directions for the care of any surviving pet. Before designating someone to take possession of your surviving pet, be sure to have a discussion with that person to ensure they are willing to take on the responsibility. Since pets are considered property, you may wish to establish a trust for your pet.

Final Letter of Instruction

Executing your final arrangements can be challenging for survivors if your wishes are unclear. Documenting your preferences can help loved ones get through this challenging time a little easier. Some suggested inclusions for a letter of instruction are:

- personal messages to survivors
- location of important documents
- funeral/memorial preferences

Final Arrangements

It's never too early to make your final wishes known to family and friends. The following offers some considerations when planning your life celebration and body disposition.

Body disposition considerations may include a choice of earth (or sea) burial, entombment or cremation. Life celebrations come in many forms. Some common options include:

- Funeral
- Viewing
- Committal
- Memorial Service

Notes continued

Lined area for notes.

Section 4: Survivor Tips

No one wants to consider losing a loved one, but we all know that it will happen to all of us. If you are a survivor charged with making final arrangements for a loved one, you might find the process to be challenging and confusing. Here are a few tips to help you navigate during this difficult time.

Obtain multiple copies of the Death Certificate - at least 10 copies; 20 copies is better. You will be asked to submit a copy of this document to many entities as you close the estate, seek benefits and more.

Collect and secure pertinent documents such as:

- the will or trust, final letter of instruction
- pre-paid funeral arrangements
- insurance policies
- most recent credit card statements
- investment accounts
- deeds, titles, stocks, bonds
- estate planning documents
- last checking and savings account statements
- last 3 years' tax returns
- marriage and birth certificates (of deceased's spouse and children)
- medical bills
- funeral bills/evidence of payment
- up-to-date credit report

Notify financial institutions, government agencies and others such as:

- Banks
- Social Security Administration
- Veterans Administration
- Deceased person's employer
- Insurance companies
- Credit bureaus
- Credit card companies
- Post Office
- Utility companies
- Creditors
- Deceased's employer

Cancel or transfer accounts, memberships and subscriptions.

Apply for benefits due the survivors.

Pay final bills and guard against financial fraud. Be careful what information you include in the obituary. Be careful with social media. Don't toss; shred. Don't leave important documents such as the death certificate or other personal records lying around, unprotected.

Get and accept help from family, friends and local organizations.

Remember Avow is here to support you and your family through your grief. Call 261-4404 anytime for help.

Additional Notes

References and Resources:

"Death and Finances: Eight Things to Do After a Loved One Passes Away" by Lynnett Khalfani-Cox. (www.dailyfinance.com/2011/02/14/death-and-finances-eight-things-to-do-after-a-loved-one-passes-away)

"Getting Your Affairs in Order" prepared by Marilyn M. Furry, PhD, Pennsylvania State University.

"Helpful Information for Surviving Family Members" by Avow Hospice, Inc.

"When Someone Dies in Florida" by Amelia E. Pohl, Esq., ISBN 1-892407-01-9



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