



DYING MATTERS

Created by: Heather D. Welborn
Funeral Director / Deathcare Researcher
Funeral Celebrant / Grief Support

Email: allherfriendsaredead@gmail.com
Website: www.allherfriendsaredead.com

Where to Find It

It's important to let your family know where you have placed these items for safe keeping. If you are not sure where something is located, now might be a good time to locate it. If you don't know where it is, your family may have an even harder time finding it. For each document or item, indicate where it is, such as in your safe deposit box, a fireproof box, a filing cabinet, or an electronic file, or with this book. Obviously, not everything needs to be, or even should be, stored in a safe deposit box; many items wouldn't even fit.

MY NAME: _____

My safe deposit box is located at:

Bank name: _____

Box number: _____

Address: _____

Who has access to the box: _____

PERSONAL HISTORY

RECORD TYPE	SAFE DEPOSIT BOX	OTHER LOCATION
Adoption papers	<input type="checkbox"/>	
Alimony settlement agreement	<input type="checkbox"/>	
Animal care information	<input type="checkbox"/>	
Annulment decrees or judgments	<input type="checkbox"/>	
Appointment books or calendar	<input type="checkbox"/>	
Athletic awards/certificates	<input type="checkbox"/>	
Birth certificates	<input type="checkbox"/>	
Caregiving information: Children	<input type="checkbox"/>	
Caregiving information: Parents	<input type="checkbox"/>	
Change of name certificates	<input type="checkbox"/>	
Citizenship/naturalization	<input type="checkbox"/>	
Civic awards	<input type="checkbox"/>	
Cohabitation agreement	<input type="checkbox"/>	
Digital photos	<input type="checkbox"/>	
Divorce decrees or judgments	<input type="checkbox"/>	
Durable power of att. for health care	<input type="checkbox"/>	
Dramatic awards	<input type="checkbox"/>	
Driver's license	<input type="checkbox"/>	
Educational awards	<input type="checkbox"/>	
Educational certificates	<input type="checkbox"/>	
Educational transcripts	<input type="checkbox"/>	
Employment awards	<input type="checkbox"/>	
Keys to post office box/safe deposit box	<input type="checkbox"/>	
Keys to residence/vehicles	<input type="checkbox"/>	
Keys to other real estate	<input type="checkbox"/>	
Membership awards/certificates	<input type="checkbox"/>	
All Powers of Attorney paperwork	<input type="checkbox"/>	
Military awards	<input type="checkbox"/>	
Military separation papers	<input type="checkbox"/>	
Passport	<input type="checkbox"/>	
Passwords/Lock combinations	<input type="checkbox"/>	
Pet care	<input type="checkbox"/>	
Pre/Postnuptial agreement	<input type="checkbox"/>	
Property information	<input type="checkbox"/>	
Security system information	<input type="checkbox"/>	
Storage unit location	<input type="checkbox"/>	
Tax returns and records	<input type="checkbox"/>	
Timeshare records	<input type="checkbox"/>	
Videos/Movies catalog	<input type="checkbox"/>	
Other	<input type="checkbox"/>	

FAMILY HISTORY

RECORD TYPE	SAFE DEPOSIT BOX	OTHER LOCATION
Adoption papers: Children/Pets	<input type="checkbox"/>	
Birth certificates	<input type="checkbox"/>	
Citizenship/naturalization papers	<input type="checkbox"/>	
Marriage certificates	<input type="checkbox"/>	
Photo Albums	<input type="checkbox"/>	
Portraits	<input type="checkbox"/>	
Other	<input type="checkbox"/>	

INSURANCE POLICIES

RECORD TYPE	SAFE DEPOSIT BOX	OTHER LOCATION
Annuities information	<input type="checkbox"/>	
Automobile/Boat information	<input type="checkbox"/>	
Homeowner information	<input type="checkbox"/>	
Life information	<input type="checkbox"/>	
Long-term care information	<input type="checkbox"/>	
Medical information/cards	<input type="checkbox"/>	
Medicare information	<input type="checkbox"/>	
Pre-need funeral contract		
Renter information		
Umbrella		
Other	<input type="checkbox"/>	

BENEFITS

RECORD TYPE	SAFE DEPOSIT BOX	OTHER LOCATION
401(k) agreements	<input type="checkbox"/>	
Disability agreements	<input type="checkbox"/>	
IRA agreements/statements	<input type="checkbox"/>	
Medicare summary notices	<input type="checkbox"/>	
Military separation papers	<input type="checkbox"/>	
Pension agreements	<input type="checkbox"/>	
Social Security card/information		
Workers' compensation		
Other	<input type="checkbox"/>	

BANKING AND SAVINGS

RECORD TYPE	SAFE DEPOSIT BOX	OTHER LOCATION
Checking account statements	<input type="checkbox"/>	
Credit union account statements	<input type="checkbox"/>	
Savings account statements	<input type="checkbox"/>	

INVESTMENTS

RECORD TYPE	SAFE DEPOSIT BOX	OTHER LOCATION
Brokerage account statements	<input type="checkbox"/>	
Certificates of deposit	<input type="checkbox"/>	
Savings bond	<input type="checkbox"/>	

REAL ESTATE

RECORD TYPE	SAFE DEPOSIT BOX	OTHER LOCATION
Cemetery deed	<input type="checkbox"/>	
Deeds	<input type="checkbox"/>	
Easements	<input type="checkbox"/>	
Home improvement records	<input type="checkbox"/>	
Land contracts	<input type="checkbox"/>	
Leases	<input type="checkbox"/>	
Mineral rights	<input type="checkbox"/>	
Mortgages	<input type="checkbox"/>	
Reverse mortgages	<input type="checkbox"/>	
Tax records		
Timeshare agreements		

OTHER ASSETS AND DEBTS

RECORD TYPE	SAFE DEPOSIT BOX	OTHER LOCATION
Business records	<input type="checkbox"/>	
Computers	<input type="checkbox"/>	
Copyrights	<input type="checkbox"/>	
Collectibles	<input type="checkbox"/>	

Credit card contracts	<input type="checkbox"/>	
Jewelry appraisals	<input type="checkbox"/>	
Jewelry inventory	<input type="checkbox"/>	
Patents and trademarks	<input type="checkbox"/>	
Rare books	<input type="checkbox"/>	
Vehicles		
Vehicles' certificates of title		
Warranties		
Websites		

ESTATE PLANNING

RECORD TYPE	SAFE DEPOSIT BOX	OTHER LOCATION
Durable power of attorney	<input type="checkbox"/>	
Letter of instruction	<input type="checkbox"/>	
Trust agreement	<input type="checkbox"/>	
Will and codicils	<input type="checkbox"/>	

FINAL WISHES

RECORD TYPE	SAFE DEPOSIT BOX	OTHER LOCATION
Body bequeathal papers	<input type="checkbox"/>	
Celebration of life prearrangements	<input type="checkbox"/>	
Cemetery deed	<input type="checkbox"/>	
Cremation prearrangement papers	<input type="checkbox"/>	
Ethical will/Legacy documents	<input type="checkbox"/>	
Funeral prearrangement papers	<input type="checkbox"/>	
Health care directives	<input type="checkbox"/>	
Legacy information	<input type="checkbox"/>	
Letters to be sent	<input type="checkbox"/>	
Living will		
Mausoleum deed		
Obituary		
Pet continuing care		
People to contact		
Uniform organ donor card	<input type="checkbox"/>	

