

**Dear Fellow CKCS Member:**

As you requested, I am sending you a copy of the OUTLINE as I referred to it in my article in a recent issue of *THE COMPUTER FILE*. When I first presented this to my Word Processing SIG class, I called it a DEATH DATA FORMAT document.

(1) I am attaching a copy to this Email. (WP SIG death data format.doc)

I hope you take the time to do this. It gives one peace of mind, but I guarantee, some relative will thank you for your efforts.

Suggestion: Don't print this document. Just highlight my topic suggestions and substitute your current information in your own words. Delete categories that don't apply to you and add those that do. Store this in your computer -- if you do it right, you will be updating this information several times a year. Therefore it makes no sense to constantly be printing this every time it is revised. Make sure the right people know where to find the document and how to get there.

Best Regards,

Jerry Heaton

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**ITEMS TO CONSIDER FOR A  
DEATH DATA DOCUMENT**  
TO BE VIEWED BY RELATIVES AT TIME OF DEATH ONLY

**Date prepared / updated**

**NOTE TO FAMILY MEMBERS:**

You may want to start with a note to your relative as to why you have created this document. Be sure to change the date each time you update information herein.

**VALUABLE PAPERS**

Where do you keep your valuable papers?  
Bank deposit box?  
Fireproof safe? (how do they get access?)  
File cabinet?

## **SOCIAL SECURITY NUMBER**

My SSN is :-----

Needed by

- Funeral Home
- Armed Forces for benefits
  - If military where is the Form DD214 (Report of Separation from the Armed Forces of the United States)

## **BIRTH CERTIFICATE**

Location of your birth certificate official copy and photo copies. More than one copy may be needed.

## **WILL**

Where is the original copy of your will? Do you have more than one original copy? (recommended) Where are they?

Who are your witnesses and how to locate the witnesses? (If they are all deceased or not available, you may want to do a new will)

## **OBITUARY**

Have you written your obituary?

Location?

## **FUNERAL ARRANGEMENTS**

If you have made funeral arrangements what are the details?

Where is the information?

## **BURIAL PLOT**

Have you purchased a cemetery lot?

Where?

Status of it?

Location of deed?

## **HOUSE**

Where is the deed to the house?

How much did you pay for the house and when did you buy it?

If renting, where is the rental agreement?

Where are the tax assessment papers?  
Is there a mortgage? Status?

## **OTHER REAL ESTATE**

Do you own other property. If so where? Answer same questions found under house above.

## **CAR**

Where are the registration papers on the car?  
Is there a car loan?  
Where is the motor vehicle license?

## **BANK ACCOUNT(S)**

What bank accounts do you have?  
In what bank(s)  
What are the account numbers? Person to contact at the bank?

Are you a treasurer for any club where you control someone else's money?  
Where do you have account balances stored? Are they in your computer?  
Where are the bank statements? Who should those funds go to?

## **BANK LOCK BOX**

Do you have a bank lock box and if so where is it? Where are the keys? (Some banks charge \$150 if the box is closed with no keys)

## **SAVINGS ACCOUNT**

Give information about any savings / money market account you may have.

## **DEBTS**

What debts do you have?  
To whom?  
Where are the papers on them?

## **BANK / DEBIT CARD**

List the bank card you have with a card number.  
Who should be contacted if stolen? List a phone number and contact to call.

## **CREDIT CHARGE CARDS**

List, one by one, each of the credit cards in your wallet or purse.

List the number.

List the phone number to call in case the card is stolen.

## **STORE CHARGE CARDS**

Give complete information about any store charge you may have or carry.

How to cancel the card.

## **GASOLINE CREDIT CARD**

Give complete information about any store charge you may have or carry.

How to cancel the card.

## **LOST WALLET**

If your wallet or purse isn't found with you, in addition to canceling credit cards the following agencies should be notified also.

Call the three national credit reporting organizations immediately to place a fraud alert on your name and SSN. This keeps someone from applying for credit via the Internet or other means in my name. The alert means any company that checks your credit knows your information was stolen and they have to contact you by phone to authorize new credit.

The numbers are:

TRANS UNION	1 800 680 7289
EQUIFAX	1 888 397-3742
EXPERIAN	1 888 397 3742
SOCIAL SECURITY FRAUD LINE	1 800 269 0271 10am to 4pm

## **INVESTMENTS**

If you have investments, who handles them?

What are the account numbers?

Do you keep account of them in your computer?

Where are the monthly reports?

## **HOUSE AND OTHER KEYS**

Where do you keep extra house keys if any?

What keys do you carry with you?

What do they fit?

## **MORE KEYS**

Do you possess keys to anyone else's house?  
Where do you keep them? Who should get them?

## **COMBINATION LOCK**

What is the combination to any combination locks you have on hand.  
Do you have padlocks?  
Where are padlock keys?

## **PROPERTY SURVEY**

Has your property been surveyed?  
Where is the survey?

## **INSURANCE POLICIES**

List each insurance policy you have one by one.  
List the policy number  
List the company which underwrites it.  
Phone number and person to contact.  
Where are the original policies? (If you don't know, maybe you should apply to the company and ask for a duplicate policy.)

## **HIDDEN CASH MONEY.**

Do you have cash hidden somewhere? (Wouldn't it be a shame if the old sofa was sold for \$100 and you had \$200 in cash hidden in it?)

## **RETIREMENT FUND**

Do you receive any retirement checks?  
Will they continue to be paid to beneficiaries?  
Who pays them?  
Who do you contact?

## **POST OFFICE BOX**

Do you have a PO Box?  
Number?  
Where is the key?

## **PETS**

Discuss the disposition for any pets you may have.

## **TICKETS**

If you have purchased season tickets to stage shows, basketball or football games, where do you keep your tickets?

## **PAPERS FOR FAMILY MEMBERS**

If you have established file folders for specific family members to have – perhaps some collectables -- where do you keep them?

Things you might like to see happen. (Remember these are not binding unless specifically mentioned in a valid will.)

**OTHER ITEMS YOU THINK TO LIST -- APPLICABLE TO YOUR PARTICULAR SITUATION**