

- Directives about organ donation.
- Suggestions for any memorial service or ceremony to be held after your death.
- Whether or not you would like an obituary published in the newspaper and if so, facts you feel are important to include.
- Burial instructions, including the name of the cemetery, location of plot and any cemetery deed. If you are to be cremated, your cremation authorization form and instructions about the disposition of your ashes.
- The names, addresses and phone numbers of people to be notified of your death. You may remember your best friend from thirty years ago, but your children or personal representative may not.
- Identification of any churches, clubs, societies or lodges to which you belong and your wishes about notification of your death.
- The location of your will and/or trust and copies of any transfer on death deeds.
- The location of any safety deposit box, the names of co-owners or deputies and the location of the keys.
- The location of important documents, including Social Security and Medicare cards, automobile titles, real property deeds, armed service discharge papers, marriage or divorce papers, birth or baptismal certificates and any other legal papers.
- A description of all insurance policies such as accident, casualty, home owners, and life. Provide the name of the agent, company, policy number, amount of coverage, and the names of any beneficiaries.
- A listing of any pension, death benefits, insurance, annuity, or profit sharing plans in which you may be a participant and the location of information concerning such plans.
- If you are a veteran, information about spousal benefits, burial benefits and insurance such as FEGLI.
- Information about banks, savings and loan associations, money market accounts, credit unions, certificates of deposit, mutual funds and other accounts. Show account numbers and whether the account is held individually or jointly (if held jointly, your co-owner will own the account after your death). Provide information about any “pay on death” beneficiaries and any insurance benefits for each account.
- A list of U.S. Savings Bonds, denominations, serial numbers and in whose name they are registered and to whom they are payable on death.
- A list of stocks and bonds, how owned, their location, the amount of your investment and any transfer on death beneficiary provisions.
- A description of any business or enterprise in which you hold an interest, such as a corporation, partnership, limited partnership, or shared ownership in property such as a vacation home, boat or recreational vehicle.

- ❑ Details of your real property ownership such as the location of the real property, how owned and the amount of your investment. Describe any mineral rights or grazing rights you own. If you are a party to a lease, provide a copy.
- ❑ Location and identification of house and automobile keys and other keys that may be useful (back gate, storage unit, gas cap on car, etc.). Also combinations to locks and passwords to protected computer files.
- ❑ Tax information including recent tax returns, whether you make estimated payments, and the amounts and due dates of your real or personal property tax.
- ❑ Information about your personal effects and tangible personal property (heirlooms, clothing, jewelry, art, books, televisions, electronic equipment, computers (including passwords), antiques, musical instruments, china, silver, linens, tableware, furniture, house furnishings, etc.) and to whom you want this property to pass to if you have not already indicated these wishes in your will or on a list of tangible personal property.
- ❑ Information about bills, including charge account numbers, balances and the location of charge cards. Describe any bills you have

automatically deducted from your bank account.

- ❑ Information about loans, promissory notes, real estate contracts, accounts receivable or other obligations payable to you, including the location of the documentation, name of the person who owes the money, terms and current balance.
- ❑ Pet information, including short term information such as food and medicine schedules, as well as long term information such as potential adoptive homes.
- ❑ You may wish to write a letter to your loved ones giving them special instructions or words of calm for this difficult time. The letter will not be legally binding but may provide comfort or help to resolve disputes.

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**SENIOR
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LAW OFFICE**

ORGANIZING IMPORTANT INFORMATION FOR YOUR PERSONAL REPRESENTATIVE, FAMILY AND FRIENDS

Your friends, loved ones and personal representative will need to locate information after you die. This will likely be a stressful time for them. However, applying some thought and common sense now can make their task easier. Spend a few minutes thinking about the things you own and the tasks that must be accomplished after your death. Make your records accessible and organize them in a manner that will make it easy to administer your affairs. Some things you may wish to consider are: