

# Roadmap for Heirs

In the event of your sudden death or incapacity, your heirs or caregivers need a map of your personal affairs. Use the following list as a starting point. Keep it up-to-date in your personal financial files, and be sure your heirs have a current copy. This Worksheet can be filled in and saved electronically, or printed for hand entry.

## Your Home

<b>Security</b>	<b>Location/Instructions</b>	<b>Name</b>	<b>Address (City, State, Zip)</b>	<b>Phone Number</b>
People who have an extra key to your home	_____	_____	_____	_____
Location of any hidden extra keys	_____			
Instructions for turning off the security system	_____			
	_____			
<b>Employees</b>	<b>Arrangement</b>	<b>Name</b>	<b>Address (City, State, Zip)</b>	<b>Phone Number</b>
People who work for you: Schedule and compensation arrangement plus contact info	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
<b>Friends/Neighbors</b>	<b>Relationship</b>	<b>Name</b>	<b>Address (City, State, Zip)</b>	<b>Phone Number</b>
Friends & neighbors who know you and watch out for you	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
<b>Local Police</b>	<b>Phone Number</b>			
Emergency phone number	_____			
Non-emergency phone number	_____			
<b>Financial Records</b>	<b>Location</b>			
Location of financial and other personal records kept within your home	_____			
Location of original copies of your will, trusts and durable powers of attorney	_____			
Location of safe deposit box and location of key to safe deposit box	_____			
<b>Home Computer</b>	<b>Location</b>			
Location of list of computer passwords	_____			

# Roadmap for Heirs

## Your Personal Contacts

List those who you would like contacted in the event of a major incapacity or death.

	Name	Address (City, State, Zip)	Phone Number
Your adult children			
Your young child's schoolteacher			
Your young child's potential guardian			
Priest/rabbi/minister			
Social worker or retirement community ombudsman			
Estate planning attorney			
Business planning attorney			
Accountant			
Employer			
Insurance agent			
Veterinarian			
Friends/colleagues/other family members			

## Your Healthcare

	Name	Address (City, State, Zip)	Phone Number
Primary & specialist physicians			
Pharmacy			
Preferred hospital			
Preferred nursing home			
Preferred retirement community			
Preferred funeral home			

# Roadmap for Heirs

## Prearrangements

Custodial Care	Location/Instructions	Company Name	Address (City, State, Zip)	Phone Number
Custodial care prearrangements				
Long-term care insurance (company and location of policy)				
Postmortem Preferences	Location/Instructions	Company Name	Address (City, State, Zip)	Phone Number
Postmortem preferences prearranged				
Would you like your body to be cremated, buried, entombed, embalmed, donated to science?				
Do you intend to make an organ donation?				
Have you purchased a burial plot? A headstone?				
Have you chosen a funeral home? Location of written details of funeral prearrangements				

## Data for Death Certificate

For each person:	Yourself	Your Spouse	Other Family	Other Family
Full legal name				
Social Security number				
Date of birth				
Date of death				
Birthplace				
Mother's full maiden name				
Father's full name				
Military veteran?				
Race				
Occupation and highest level of education				

# Roadmap for Heirs

## What You Own

**Daily Bank Accounts (including CDs)**

Name of Institution/Person	Account Number/Location	Address (City, State, Zip)	Phone Number

**Accounts Receivables (Does anyone owe you money?)**


**Investment Accounts (taxable and retirement)**


**Life Insurance Policies**


**Other Potential Death Benefits (e.g. Veteran's Admin.):**

Contact information and data required to identify yourself to that institution


**Real Estate (your residence and all other properties)**

Property	Address (City, State, Zip)

**Special Personal Possessions:**

Collectibles & antiques with substantial monetary value, and items with emotional value

Item	Location	Instructions

# Roadmap for Heirs

## What You Owe

Credit cards are listed in a different section. In this section, include information about each major debt, including:

	Loan Number/Location	Name of Financial Institution	Address (City, State, Zip)	Phone Number
<b>Mortgages:</b> First mortgage & home equity lines of credit	_____	_____	_____	_____
	_____	_____	_____	_____
<b>Car Loans</b>	_____	_____	_____	_____
	_____	_____	_____	_____
<b>School Loans</b>	_____	_____	_____	_____
	_____	_____	_____	_____
	Location of Loan Note	Name of Person	Address (City, State, Zip)	Phone Number
<b>Debts You Owe Other People</b>	_____	_____	_____	_____
	_____	_____	_____	_____
	Name/Schedule	Employer	Address (City, State, Zip)	Phone Number
<b>Salary Income</b>	_____	_____	_____	_____
	_____	_____	_____	_____
	Account Where Deposited			
<b>Social Security Payments</b>	_____			
	_____			
	Name	Former Employer	Payment Schedule	Payment Location
<b>Pensions</b>	_____	_____	_____	_____
	_____	_____	_____	_____
	Property Address	Payment Schedule		
<b>Rental Income</b>	_____	_____		
	_____	_____		
	Account Number	Name of Financial Institution	Address (City, State, Zip)	Phone Number
<b>Trust Income</b>	_____	_____	_____	_____
	_____	_____	_____	_____
	Source of Payment	Address (City, State, Zip)	Phone Number	
<b>Alimony</b>	_____	_____	_____	
	_____	_____	_____	
	Account No./Payment Schedule	Name of Financial Institution	Address (City, State, Zip)	Phone Number
<b>Automatic Payments From Portfolio</b>	_____	_____	_____	_____
	_____	_____	_____	_____

# Roadmap for Heirs

## Main Expenses

*In addition to regular utilities, property taxes, insurance premiums, and estimated tax payments, there are the following regular expenses:*

	Name of Institution	Card Number	Phone Number
<b>Credit Cards:</b> Major credit cards & department store cards			

	Name	Address (City, State, Zip)	Amount/Schedule
<b>Sums you have been sending to various individuals</b>			

	Service/Schedule	Name	Address (City, State, Zip)	Phone Number
<b>Services Utilized:</b> Landscaper, dog sitter, cleaning help, beauty salon, etc.				