Notebook Checklist
Preparing for the Loss of a Spouse

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Materials Needed: 3-Ring Binder, Page Protectors

Instructions: Gather all documents. Make copies and place originals in fire safe or safety deposit box. You may also want to scan original documents and burn them on a CD and place the CD in the safety deposit box or fire safe. This information is necessary in case of an emergency, and it is also valuable for everyday reference. Update binder yearly. Keep binder in a safe place.

Personal Records

- Emergency contact list
    - Family and friends to contact in case of an emergency. List addresses, phone numbers, and email. Provide at least one out of state contact.
    - Full names and birthdates of all people living in your household. List their medical providers, daily medications, and allergies.
    - List contact information for the executor of your will or trust.
    - Keep additional copies of this contact list in your car, purse/planner.
- Copy of marriage certificate
- Copy of birth certificates
- Social Security numbers
- Health insurance numbers including Medicare/Medicaid
- Driver's license numbers
- Professional license
- Military service numbers
- Patriarchal blessings, ordinance records, priesthood line of authority
- Immunization records
- Divorce judgment or decree if divorced
- Location of computer passwords for home and work

Account Information – Place a recent statement in a page protector. Update statements at least once a year. Review co-signers of bank accounts.

- Banks (checking, savings, and credit union)
- Credit cards
- Mortgages
- Loans
- Pay check stub
- Summary of monthly income
- Summary of monthly bills, expenses, and budget. If using a computer program, include easy to follow instructions and passwords!

Insurance Information – Place recent statements in page protectors.

- Home
- Auto
- Life
- Health
- Other (long-term care, credit card, disability, burial, etc.)
- Social Security insurance info. If you need an update call 1-800-937-2700 and ask for SA7004.

Retirement/Investment Information – Place a recent statement in page protector. Update statements yearly. Review beneficiaries.

- Pensions/profit sharing
- 401(k) plans
- IRAs
- Stocks
- Bonds
- Income property
- Notes, debts of mortgages owed to you
- Appraisal, inventory, and location of other valuables such as artwork and jewelry
- “Buy-Sell Agreement” and other business ownership documents
- Real-estate or escrow papers
- Location of titles (car, boat, home). Review the name(s) of the title holder(s).
- Safety deposit box – location, “right to access,” box keys or combination
- Other

Tax Information – Place a recent statement in page protector. Update statements yearly.

- Property tax (auto, home, other)
- Location of past three years of tax returns
- Talk with your accountant about tax implications of cashing out 401(k) plans, pensions, and other death benefits.

Wills/Trusts

- Living Will – Download living will forms, www.carefordying.org
- Medical Power of Attorney
- Power of Attorney
- Will, trust, & trust amendments (make copies and keep originals in safe place).

Funeral/Burial Information

- Do I know what to do if a loved on dies? See “Resources” section.
- Letter and Testimony to Family – helpful especially if you don’t get the chance to say goodbye
- Contact List – family, friends, bishop (clergy) to notify
- Name and contact information of mortuary
- Plan for body – cremation, embalmed, or immediate burial
- Casket and grave liner selection
- Flowers
- Burial Clothing
- Location of Services
- Obituary information
- Suggested Donations
- Viewing – open or closed casket
- Funeral program (speakers, musical numbers, special scriptures, pall bearers)
- Photo for obituary, funeral program, and display
- Cemetery – location of plots
- Headstone
- Veteran Benefits
- Death Certificates (most people need at least 15)

After Funeral Details

- Contact Social Security – 1-800-772-1213
- Veteran’s benefits
- Bank accounts – notify of death, review co-signer on accounts
- Notify Post Office
- All past employers
- Medical insurance – remove deceased from plan and review survivor’s benefits
- All Accounts (financial, retirement, credit card, etc.) – notify of name change
- Cancel deceased driver’s license
- Make life insurance claims
- Contact lawyer, financial planner, or accountant for assistance
- Basic home and auto maintenance/repair information

Grief Information

- Websites, support groups, books
- Trusted Friends and Family
- Quotes of Comfort

Resources

- Education records
- Updated resume
- Professional network contacts
- Close contact with home teachers, visiting teachers and the bishop
- Family History – personal history, photos, memories, recordings
- A “What if” Plan
    - If my spouse were to die what would I do?
    - What decisions will I need to make in the first year?
    - Will I plan to pay off the home?
    - Do I need to go back to work?
        - How many hours will I need to work?
        - What impact will this have on my grieving children?
        - Will I need to find daycare for my children?
    - How have I dealt with stressful experiences in the past?
    - What helps me cope?
    - What habits of self-care am I working on?
    - What habits of self-care are we developing in our family?
    - What helps each of my children cope?
    - What am I learning by mourning with those that mourn and offering comfort to those that stand in need of comfort?

Disclaimer: This list is not all-inclusive but intended to provide a framework for preparing for the loss of a spouse.

What To Do When A Loved One Dies

Definition of Death: Cessation of breathing, heart beating and brain functioning.

Do I know Basic First aid and CPR?

Natural Death (terminal illness, old age)

- Contact moral support. Who is this? Have a list of names and numbers.
- Contact family
- Contact bishop
- Call mortuary
- If possible have moral support arrive before mortuary

Accidental Death (accident, suspicious, suicide)

- Call 9-1-1
- Call bishop
- Call moral support
- Call legal council
- Contact employer
- Contact school if a child