Life & Death File

Key : KEEP THIS UPDATED REGULARLY FOR EACH FAMILY MEMBER / AN
EXECUTOR OF YOUR WILL NEEDS TO KNOW WHERE THIS INFORMATION IS FILED

1. **Personal Documents**

Where possible keep the original documents here or certified copies where not possible.

Identity Documents (copies)

Birth Certificates (copies)

Marriage Certificate (copy)

Passports (copy)

Driver’s licence

Social Security Numbers

2. **Will**

3.  **Associate Information - Contact Details**

Accountant

Attorney

Auditor

Broker

Doctor

Employer

Executor

Guardians

Insurance Agent

Tax Advisor

Pastor

4.  **Address Book**

General

Health Insurance

Spouse

Neighbors

Garden Service

Next of Kin

School

Bank Info

Insurance

Repairman

Local friends

Extended family

Other

5. **Banking Details**

Account numbers / Banks / Branches / Bankers name & number

Current Account

Savings

Credit Cards

Vehicle financing - Copy of latest vehicle license / copy of title deed

Mortgage account

Debit order list, include details

6.  **Insurances**

Details of your broker plus all your insurance policies. Have your policies been seeded to anyone?

7.  **Investments**

R.A’s

Shares

Equities

Jewellery

8. **Accounts: Account numbers & contact details**

Clothing

Telephone

Utilities

Post

Library

Cell phone

Magazines / Newspapers

School

9.  **Health Information**

Health Insurance, scheme, type, number

Vaccination cards

10. **Funeral arrangements & Living Will**

Funeral policy?

Organ Donor?
 Family member 1
 Family member 2
 Family member 3
 Family member 4

Tissue Donor?
 Family member 1
 Family member 2
 Family member 3
 Family member 4

Cremated / Buried?
 Family member 1
 Family member 2
 Family member 3
 Family member 4

Flowers?
 Family member 1
 Family member 2
 Family member 3
 Family member 4

Memorial Service?
 Family member 1
 Family member 2
 Family member 3
 Family member 4

Pall Bearers?
 Family member 1
 Family member 2
 Family member 3
 Family member 4

Favorite Hymns / music?
 Family member 1
 Family member 2
 Family member 3
 Family member 4

Favorite verses / scriptures?
 Family member 1
 Family member 2
 Family member 3
 Family member 4

11.  **Personal Information**

Computer Passwords

Bank Passwords

Copies of house keys

Personal Loans

Secret Hiding Places

Where to find originals if not in this file

12.  **Letters**

From the husband: with suggestions on how to handle money, property, investments etc.

From the wife: stating where her husband could find all the information / documents
necessary for him to be able to handle things (children, activities etc) that keeps the home going.