

## Family Information Sheet

This is a generic form for use by any and all family members to assist those we have left behind. It is not all-inclusive, and is provided as a starting point for you and your family to discuss and to help them get through a difficult period.

Below are links to some excellent guides to assist you and your family. No endorsement of the company is implied, just provided as another excellent resource for you to use.

<http://www.neptunesociety.com/docs/TheCompleteChecklistForWhenALovedOnePassesAway.pdf>

<https://www.neptunesociety.com/docs/Everything-You-Need-to-Know-About-Preplanning-Your-Final-Arrangements.pdf>

<https://www.neptunesociety.com/docs/Veteran-Death-Benefits-and-Memorialization-for-Service-Members-and-Their-Families.pdf>

<http://www.neptunesociety.com/docs/TheConversationChecklist.pdf>

Following is some of the big items to consider, and are provided for a starting point.

Get a will made. Unless you have absolutely nothing of value, and don't care who it goes to. Otherwise it goes to a probate judge, attorneys involved, money wasted. Simple wills are easy, can go online and do it. No reason not to, and plenty of reasons to get it done.

Medical Power of Attorney, Living Will and a Durable POA. Again – get it done. Regarding a Durable POA – choose your agent(s) carefully.

Register your wills and POA's with the county clerk, have a copy of the medical filed with the hospital.

Your Personal Info needed – Your name, SSN, Date of Birth and Where. If any military time – dates of service. Parents names including mother's maiden name.

In no set order ---

- Once you've made the list, store it in a secure place. Fire-resistant safe is good, make sure someone besides yourself knows how to get into it. Otherwise, store it in a ziplock bag in the freezer.

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- If you already have a prepaid mortuary policy, list the name, policy and contact number for arrangements. Along with this – list your funeral-memorial-disposition desires.
- If an organ donor – ensure your driver’s license shows that, and family members are aware.
- Get five copies of certified death certificates. Be aware if the member was a veteran a certain number are free (varies by funeral home). After you get the certified ones, make another half dozen photo-copies. You can go to the bank and have the copies notarized if necessary. Use the copies wherever an original is not required.
- If a veteran, contact the Defense Finance DFAS Casualty Care Team at 800-321-1080. Have the date of death and SS#. They will send a letter and SF1174 Claim for Unpaid Compensation of Deceased Member of the Uniformed Service. Fill out the form and send it back with a copy of the death certificate (not a notarized original) to: Defense Finance and Accounting Service

U.S. Military Retired Pay  
8899 E 56th Street  
Indianapolis IN 46249-1200

Defense Finance and Accounting Service

U.S. Military Annuitant Pay  
8899 E 56th Street

Indianapolis IN 46249-1300 Fax # 800-469-6559 <https://www.dfas.mil/retiredmilitary.html> for additional information.

- Contact the bank and inform them of death. Note: Talk with your banker ahead of time to verify their states rules regarding possible freezing of the account. Some states freeze the account upon notice of death – locking all money until probate is conducted. That means no money available. If your state is one of these – then first step is open a new account in the survivor’s name, and transfer most of the money over, taking some in cash to handle immediate needs. THEN inform the bank of the death.
- Contact Social Security Administration at 800-772-1213. The funeral home should have informed Social Security of the death, but verify. Also, will need to go to SS office to arrange for any follow-on benefits.

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- Defense Enrollment Eligibility Reporting System (DEERS) (ID card and medical benefits) at 800-538-9552.
- Department of Veterans Affairs (VA) at 800-827-1000.
- Attach a copy of DD214 to your files. If not available and need a replacement, contact <https://www.archives.gov/personnel-records-center/military-personnel>
- List your various accounts and passwords. If you desire to not list them in print, then list them in a computer file that is password protected, and leave instructions as to the password used. Be aware of fire or theft security.
- Take an original and a copy of the last will & testament and certified copy of death certificate to county records office to get it registered into system and house deed transferred over. Reason for copy is they may need to photocopy the pertinent pages of the will, and some states require the original not unstapled for making copies.
- House and car insurance info – policy numbers and POC.
- Financial Advisor name and phone number, along with account numbers.
- Life Insurance policies. Local agent name and number, or home office #.
- Credit card account info. Note: credit cards that are owned only by the deceased (not joint custody accounts, strictly single owner with authorized users added) are not the fiscal responsibility of the survivors. The card company can put a claim against the estate (if any), but cannot force the surviving family or authorized users to pay.
- Keys / access # for any safes. Any instructions regarding disposition of items in the safes. Note – this can be an addendum to the will if you want your desires to be legally binding.
- Any house or garage door access numbers. Location of instructions on how to reprogram the controller(s).

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- Note – majority of states do not require assignment of probate/estate executor if all assets were owned jointly. Those assets will transfer to the survivor. However, items not of a joint nature are considered to be assets of the deceased's estate. These items will require assignment of an Estate Agent and is officially assigned via the County Clerk's probate office. The clerk's office will also have the standard form for a newspaper announcement for Notice to Creditors giving legal notice and starting the statute of limitations for filing a claim against the estate. Timeframes vary from state to state.
- Last but not least – **TALK WITH YOUR FAMILY ABOUT THIS !!** Do not leave them in a vacuum. They've got enough stress right now without trying to figure out where things are, what type of burial/cremation/casket/memorial, how to pay for things, etc. Do everyone a favor and talk with them, then fill this information out.

Disclaimer: Provided as a guideline for providing information for you or your family members to enable them to easier manage difficult end of life or serious illness situations. It is a guide only, and is not intended to provide legal advice. It is recommended the advice of legal counsel be obtained for any situation warranting it. This form may be freely copied and shared. I only ask that due credit be assigned.

Respectfully,

Mr. Jerry Wells  
Originator