

# Survivor's Checklist

**This is a suggested list of Important Documents that families may need in order to help with certain benefits and estate matters.**

Last Will & Testament location/  
details: \_\_\_\_\_

Minister/Clergy's Name & Ph. No.: \_\_\_\_\_

Attorney's Name, Ph. No.:  
\_\_\_\_\_

Physician's Name & Ph.  
No.: \_\_\_\_\_

Birth & Marriage Certificates location: \_\_\_\_\_

Social Security Information: \_\_\_\_\_

Citizenship  
Documents: \_\_\_\_\_ Insurance

Policies (Including - Company, Policy #, Beneficiary, Amount of Benefit):

Health: \_\_\_\_\_

Life: \_\_\_\_\_

Homeowner/  
Renter: \_\_\_\_\_

Personal

Liability: \_\_\_\_\_

Auto: \_\_\_\_\_

Property Records/Deeds (Including Auto, Mortgage, & Other  
Property): \_\_\_\_\_

Cemetery  
Deed: \_\_\_\_\_

Bank Accounts (Including - Institution, Account #, Type of Account, Name(s) on  
Account): \_\_\_\_\_

Safe Deposit Box(s) (Including- Location of Box & Key,  
Content(s): \_\_\_\_\_

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Credit Cards (Including Location, Account #,  
Type):

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V.A. Documents (DD214)

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