

Before My Parents Pass

A Checklist to Ease Your Loss When the Time Comes

While we never want to say goodbye to a parent, there comes a time when we have to think about life's difficult moments and prepare ourselves for what's to come. In the midst of a loss, the last thing you should be thinking about is banking information, material possessions, or other paperwork tasks that take you away from what matters most. You have more important things to handle. That's why we created a checklist to assist you, and your parents, in their departure.

This free guide is a place for your parents to list important bank information, document locations, and list their final wishes. Your parents can use this guide to keep everything centrally located, so you can handle their obligations sooner rather than later. When the time comes, instead of wondering where their will is located, everything can already be listed out for you. Relieve the difficulty of your loss by simplifying the paperwork.

How to Use Our Checklist

This list is designed to highlight everything you'll need to settle your parents' affairs. Think of it as a final to-do list. Have them fill out each question as thoroughly as possible, so you'll be able to locate everything you need easily. Upon completion, you'll rest easier knowing your parents' wishes will be honored.

This document includes several key questions they need to complete, including:

- Banking information
- The location of key documents
- Any requests for funeral arrangements

Other important details and requests can be attached to this document as needed. As your parents read over the guide, make a note of any documents that need revising, such as a will. Don't wait to update these essential documents. Our focus is to get everything up and running as smoothly as possible.

Once the guide is complete, talk to your parents about its location. Pick a spot you both agree on, and is easily accessible for you when the time comes. If they have any further questions or concerns, we're always here to clarify any documents or arrangements that must be made.



APPLEPAYNELAW, PLLC

Date:

**THE FOLLOWING IS A GUIDE FOR MY LOVED
ONES AT THE TIME OF MY DEATH**

1. My Will is located at _____ and there (is)
(is not) a memorandum/codicil which should accompany my Will.

2. My named Executor is _____

3. My Attorney's office: _____

4. I (have) (do not have) a safety deposit box and it is located at _____

5. The Banks and Savings & Loans that I regularly use include:

a) _____

b) _____

c) _____

6. All other valuable papers, not in my safety deposit box, will be found at _____

7. I presently have life insurance with the following companies, with approximate values:

<u>COMPANY NAME AND AGENT</u>	<u>VALUE</u>
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8. In case of my death, please be sure to notify (additional pages may be attached to this document):

NAME _____ TELEPHONE NUMBER _____

9. If possible, I would like for _____ Funeral Home to handle my funeral arrangements, **OR** I have already made my funeral arrangements with _____ Funeral Home.

10. For my funeral arrangements I would like my loved ones to consider the following:

This _____ day of _____, 20_____.

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