



**NEA Member
Benefits
Survivor's Guide**

Survivorship Issues

Everyone has that “special place” at home where all the important papers are kept, neatly organized in file folders, clearly labeled and understandable should the unfortunate occur. Or do we? Furnishing survivors with a detailed record of up-to-date legal, financial, and personal information in your absence will help alleviate added emotional and financial strain during what is often a painful and difficult time.

The guide is not intended to replace professional estate and legal counseling and you should feel free to customize or modify the guide to suit your family's unique circumstances. Once you complete all applicable information, we recommend you store the guide in a secure, accessible place. A safe deposit box, for instance, does not offer immediate accessibility. For extra peace of mind, tell loved ones, relatives or friends where the guide is stored. It's a good idea to continually review your financial situation and update the information you've recorded in the guide.

Inventory List

To assist your survivors in locating important papers and documents in the event of your death, we suggest you review the items listed below and record the location of only those items that apply to you.

Birth Certificate	
Marriage Certificate	
Bank Statements	
Insurance Policies	
Loan Documents	
Personal Phone Book	
Credit Card Statements	
Safe Deposit Box	
Investment Information	
Social Security Statements	
Tax Returns	
Medical Records	
Real Estate Deeds	
Vehicle Titles	
Wills/Trust	

Living Will	
Legal Papers	
Military Records	

Questions

Listed below are a series of questions - about you, about final arrangements, about your estate and about your finances. In cases where you are asked to list names, addresses and phone numbers, do so in the space provided.

About You

1. What is your:

Name _____

Date of Birth _____

Social Security # _____ - _____ - _____

2. Do you have a will or trust? _____

3. Who are the executor and alternate executor? List names, addresses, and phone numbers. _____

4. Who is your lawyer? List name, address, and phone number.

5. Who is your accountant/tax adviser? List name, address, and phone number.

6. Who are your banker/insurance/financial advisers? List names, addresses, and phone numbers.

7. Who are your doctor and dentist? List names, addresses, and phone numbers.

8. Who is your minister or religious adviser? List their name, address, and phone number.

About Final Arrangements

1. Have you made arrangements (i.e., a living will) regarding medical procedures in the event you become incapacitated? _____

2. Do you have a pre-paid (pre-arranged) funeral plan? _____

3. Have you made burial arrangements? If so, what is the name and location of the cemetery? What are the plot and deed numbers? _____

4. Have you discussed a budget for funeral and final expenses? If yes, where can instructions be found? _____

5. Do you have a preference concerning the disposition of your remains? If yes, provide instructions. _____

6. Do you wish to donate your organs? If yes, provide instructions or indicate where instructions are located. _____

7. Do you wish to have a memorial service? If yes, provide instructions. _____

8. Have you designated an organization to receive your memorial gifts? If yes, list the name and address of the organization(s). _____

9. Have you planned for the disposition of your personal belongings? If yes, provide instructions. _____

About Your Finances

1. What are your financial obligations? List mortgages, loans, and credit card balances. _____

2. Who owes you money? List location of loan documents, borrower's name, address, phone number, date of loan, amount of loan, interest rate, and repayment schedule. _____

3. Do you have a stockbroker? List name(s), firm, address, phone number, and your account numbers. _____

4. Do you own stocks, bonds, mutual funds, CDs, real estate, or any other type of investment? If so, provide and list account information for each. _____

5. Who should notify your creditors upon your death? Does that individual have all the information needed to help you pay your bills? _____
