



Jefferson Unitarian Church

Deepen. Connect. Engage.

Items Your Family May Need Upon Your Death

Computer Services- If you have email accounts, social media accounts, or other computer services you use, make sure to provide your survivors with a list of them and the passwords so they can disable them. If you do banking, investing or bill paying online, make sure that your survivors can access those accounts in the manner most fitting. Your survivors may need to fill out a form and submit a copy of the death certificate to close or transfer these accounts, and leaving a list of passwords for them may, or may not, be the right decision depending on your situation.

Financial Records- Have a list of all bank accounts, annuities, CDs, retirement accounts, pensions, investment accounts and all other financial assets you possess. Make sure to include account numbers and contact information, as well as information about named beneficiaries.

Funeral Arrangements- If you have pre-arranged memorial or funeral services, make sure to have information about the service in a readily accessible place. Things to consider for inclusion are amounts already paid, names and contact information, and any organ or body donation forms you've already completed.

Insurance Policies- A list of all your insurance policies, including life, auto and home. Make sure to include account numbers and contact information.

Memberships and Magazines- If you subscribe to or are part of organizations that mail or charge you on a regular basis, list the names so they can be canceled. Don't forget things like monthly pledges, such as NPR or your church.

Revolving Credit and Outstanding Debts- Have a list of all your credit cards, any store charge accounts, and any loan balances (car, mortgage, etc.). Make sure to include account numbers and contact information.

Safety Deposit Box- If you have a safe or safety deposit box, include information about the way to access it and the contents.

Utilities- A list of all your utilities (water, gas, electric, telephone, cell phone, etc.) and other ongoing monthly bills. Include account information, including account numbers, service addresses, and contact information.