



death care coach

with KATIE DUNCAN





DEATH-PREP CHECKLIST

INSTRUCTIONS:

Use this as a checklist to gather all of the necessary things that will help you prepare for the extensive “To-Do’s” after the person dies.

MAKE A LIST OF ALL...

- ☐ Banks and account numbers
- ☐ Investment institutions and account numbers
- ☐ Credit cards + bills
- ☐ Utility accounts + bills
- ☐ Business banks/credit cards and account numbers (if applicable)
- ☐ Subscriptions (Magazines, Newspapers, Gift Boxes, Amazon, etc)
- ☐ Email accounts
- ☐ Social Media Accounts
- ☐ All assets



LOCATE AND SECURE...

- ☐ Last year's tax return
- ☐ Life insurance policies
- ☐ Original copy of their will or trust (if applicable)
- ☐ Titles for all vehicles, campers, etc. (Have these transferred to your name)
- ☐ Get Transfer on Death Deed (TOD) for home(s)
- ☐ Any safety deposit boxes + be able to gain access
- ☐ Important personal documents:
 - ☐ Driver's License
 - ☐ Social Security Card
 - ☐ Passport
 - ☐ Birth certificate
 - ☐ Divorce Decree
 - ☐ Legal separation agreement
 - ☐ Marriage license
 - ☐ Military separation papers
 - ☐ Citizenship documents
 - ☐ Retirement documents
 - ☐ Adoption documents
 - ☐ Pet documents
 - ☐ Advanced Directives
 - ☐ Living Will
 - ☐ Durable Financial Power of Attorney
 - ☐ Durable Medical Power of Attorney



- ☐ Last Will & Testament
- ☐ Funeral Planning Declaration



USERNAMES + PASSWORDS (For EVERYTHING!!!)...

Collect and safely keep all...

- ☐ Bank ID account
- ☐ Credit Card accounts
- ☐ Financial Institution accounts
- ☐ Apple ID account
- ☐ Amazon account
- ☐ Phone accounts
- ☐ Any others!



TRACK + RECORD...

- ☐ All expenses relating to the final care and/or death of your dying person.
 - ☐ You may be able to get reimbursement from their estate or trust
 - ☐ Some may also be tax deductible for state or income tax purposes.

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