

## List of Key Documents You Should Have and Have Readily Available as You are Approaching End of Life

It is not something anyone wants to think about much less do, but many people with advanced cancer so not take the time to have their legal and financial affairs in order. When someone dies without having fulfilled this process, family members are not only grief stricken over losing their family member to cancer; they are also faced with a list of problems that could have been avoided had the patient done the right thing before passing away. Having these documents all in order, accessible by a key family member, documented as being such, who is serving as your point person as you are nearing death as well as after you are gone will prevent many problems later. For example, let's say you have a life insurance premium due in 2 weeks. No one knows about it other than you and you are too ill to deal with any paperwork or even the ability to explain to someone might be coming due for payments, and that bill doesn't get paid, you may be automatically cancelling your life insurance policy without even realizing it. You die 4 weeks later, and your family later discovers that due to no premium being past last month, your life insurance you planned to leave for your wife and children doesn't exist anymore. So do the right thing for yourself and your family and have these documents in order. They should be in a safe place too.

### Insurance Policies

- Life Insurance
- Health Insurance
- Car Insurance
- Home Insurance
- Other Insurance policies (theft, fire, earthquake, etc.)

### Bank Accounts

- Checking accounts
- Savings accounts
- Money market accounts
- Certificates of deposit (CDs)
- Debit cards

### Credit Cards

- Card number

- Expiration date
- Recent account statements
- Login and password information for online account management

#### Mortgages or Loans

- Company through which mortgage or loan was given
- A copy of the mortgage or loan agreement

#### Tax Returns

- Most recent W-2 forms or federal self-employment tax return
- Income tax returns for the current and previous year, including 1040 variations and 1099s, if applicable
- Gift tax returns

#### Pension Plans And Retirement Benefit Information

- 401(k) or 403(b) plans
- IRAs
- Roth IRAs
- Simplified Employee Pension (SEP) plan
- Salary Reduction Simplified Employee Pension (SARSEP) plan

#### Titles or Deeds To Any Property

- Real estate
- Motor vehicles
- Boats

#### Investment Portfolios

- Stocks
- Bonds

- Mutual funds

#### Will

- Copy of the Will
- Copies of previous versions of the Will
- Name of attorney or law firm that helped create the Will, if applicable

#### Trusts

- Declarations of trust or Trust agreements
- Name of attorney or law firm that helped create the Trust, if applicable
- Bank accounts associated with the Trust

#### Power Of Attorney

- Name of the person appointed to Power Of Attorney
- Power Of Attorney documentation
- Name of attorney or law firm that helped create the POA, if applicable

#### Safe Deposit Box

- Location of safe deposit box
- Safe deposit box keys or location of safe deposit box keys

#### Any Professionals Who Have Helped

- Lawyer
- Accountant
- Insurance agent

#### Advance Directive

- Living Will
- Health Care Proxy

- Do Not Resuscitate (DNR)

#### Proof of Identity And Relationships

- Social Security card
- Armed Forces discharge papers
- Birth certificate
- Death certificate
- Marriage certificates
- Divorce certificates
- Prenuptial agreements
- Divorce settlements

#### Household Utilities

- Electricity
- Gas
- Water
- Phone
- Cable
- Internet

#### Automatically Renewing Medications

- Names of medications
- Name of pharmacy where medications are renewed
- Name of doctor who prescribed medication

#### Email

- Gmail

- Hotmail
- Yahoo! Mail
- AOL
- Other email accounts associated with phone/internet services

#### Online Businesses

- Amazon
- PayPal
- Ebay

#### Social Media

- Facebook
- Twitter
- LinkedIn