

Sample: End of life file

## Summary of Contents of My Briefcase Regarding My Care and Death

So that my children will know how I wished to be cared for before my death, how I wish my death to be handled, and where the various legal and financial documents are that govern these matters, I have put them all together in various file folders in an old briefcase that sits under my desk. My children know where the briefcase is and what's in it.

Here are the various folder topics:

**WHAT'S WHERE AND KEY:** a four-page summary of key documents and location of documents and files. This summary tells them where my Will, Health Care Instructions, Power of Attorney, name and address of Attorney, are (which is in the same briefcase.)

Death instructions include a State of CT cremation certificate signed by me and witnessed by my children as well as the name of a crematory I suggest.

It cites a folder regarding disposition of my ashes and suggestions for any kind of memorial service my children may deem appropriate.

It lists names of bank and investment company and account numbers and name and contact info for investment advisor as well as passwords for any of these accounts.

It lists the sources of my current income and where they are automatically deposited.

It says the Title to my house is in my safe deposit box.

It tells where the key to the safe deposit box is kept.

It lists my social security number, name of my accountant and name of life insurance company which holds a relevant policy.

It tells where Homeowners and Auto Insurance policies are filed.

It describes my Long Term Care Policies and where the fine print and contact information is filed.

It tells where current household maintenance services are listed.

It tells where capital improvement payments are listed over the years since house was purchased.

It mentions a folder regarding disposal of my earthly goods including specific gifts to specific children and grandchildren.

## Titles of Individual File Folders

What's Where and Key (Described Above)

Medical Proxy

Power Of Attorney

My Death Instructions

Draft of Obituary

Arrangement for Burial of Ashes

Current Sources of Income and Death Benefits to Beneficiaries

Computer Passwords

Copies of Credit Cards, Driver's License, Medicare Card, Birth Certificate, Etc.

Safe Deposit Box Number, Key, and List of Contents

Homeowner's And Auto Insurance Policies

Passport and Extra Photos

Info Re Annual Maintenance of House

Beneficiaries and Bequests