

# Post-Mortem Letter Worksheet

This worksheet will guide you through the steps necessary to ensure you have collected all of the appropriate information for your survivors in the event of your death. Fill out all of the pertinent information and let your loved ones know where to find your final post-mortem letter. Attach supplementary pages where appropriate.

## **Why Write a Post-Mortem Letter?**

A post-mortem letter can protect your estate, maximize the amount available to heirs and save your spouse and executor a lot of trouble. This important letter tells your executor and survivors where to locate everything they need to carry out your instructions. Without the post-mortem letter, you risk losing part of your estate's assets because necessary assets and documentation cannot be located.

To properly represent you after your death, your executor must know almost everything you know. He or she must have all of the facts, figures, and documentation that you have at your fingertips. Only with the aid of this information can the executor carry out your desires.

The letter also serves to inform your loved ones of things you would like done in the event of your death and provides guidance as to how you would like certain items handled. This includes many things which may not be appropriate to include in your will or which need to be handled immediately after death and prior to a reading of your will.

## **Limitations of a Post-Mortem Letter**

This letter cannot be used in place of a properly executed will and does not have the legal force of a will. It also does not take the place of a living will. It is vital to have both a will and a living will in addition to a post-mortem letter.

## **The Key to Your Estate's Welfare**

Write the post-mortem letter now. Leave several copies of the letter in places where it is certain to be found after your death – e.g., attached to your will, with your spouse, with your attorney or accountant, with your executor, in a safe deposit box.

It is important to update the letter periodically to account for changes that occur after you write it.

Fill out the appropriate areas below in order to provide your survivors with the information they will need to handle your estate properly.

**Personal Information**

Your name: \_\_\_\_\_ SSN: \_\_\_\_\_  
Spouse's name: \_\_\_\_\_ SSN: \_\_\_\_\_  
Dependent child name: \_\_\_\_\_ SSN: \_\_\_\_\_  
Dependent child name: \_\_\_\_\_ SSN: \_\_\_\_\_  
Your DOB: \_\_\_\_\_  
Trustee/Executor/Administrator: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone No.: \_\_\_\_\_ Email address: \_\_\_\_\_  
Employer/contact: \_\_\_\_\_ / \_\_\_\_\_ Phone no.: \_\_\_\_\_  
Attorney: \_\_\_\_\_ Phone no.: \_\_\_\_\_  
Accountant: \_\_\_\_\_ Phone no.: \_\_\_\_\_  
Broker/Financial Planner: \_\_\_\_\_ Phone no.: \_\_\_\_\_  
Life Insurance Agent: \_\_\_\_\_ Phone no.: \_\_\_\_\_  
Physician(s) \_\_\_\_\_ Phone no.: \_\_\_\_\_  
\_\_\_\_\_ Phone no.: \_\_\_\_\_  
\_\_\_\_\_ Phone no.: \_\_\_\_\_  
Approximate size of estate: \$ \_\_\_\_\_

**Please notify the following friends/family members:**

	<u>Name</u>	<u>Phone Number</u>
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____
6.	_____	_____
7.	_____	_____
8.	_____	_____
9.	_____	_____
10.	_____	_____

**Organ Donation**

I have/have not volunteered to be an organ donor. The following organs are what I want donated, if applicable:

\_\_\_\_\_

**Pets**

I own the following pets: \_\_\_\_\_ (name and type of pet)

Please care for them as follows:

\_\_\_\_\_  
\_\_\_\_\_

**Will**

I have placed my will in the following location: \_\_\_\_\_

My (attorney, trustee, etc.) \_\_\_\_\_ also has a copy of my will.

**Guardians**

I have named \_\_\_\_\_ as guardian of my minor child(ren). He/She/They can be reached at \_\_\_\_\_ / \_\_\_\_\_ (phone number/address).

**Funeral and Cemetery Plot**

The following details outline my wishes for a funeral ceremony/service/burial:

\_\_\_\_\_  
\_\_\_\_\_

My cemetery plot is located at \_\_\_\_\_

The deed to my plot can be found \_\_\_\_\_

**Safe Deposit Box/ P.O. Box**

My safe deposit box can be found at \_\_\_\_\_ (name of bank), located at \_\_\_\_\_ (address of bank) / \_\_\_\_\_ (phone number of bank)

The keys to my safe deposit box can be found \_\_\_\_\_

My combination/code is \_\_\_\_\_

I do/do not have a P.O. box in my name.

It is located at \_\_\_\_\_ (location of post office). The box number is \_\_\_\_\_

The key to the P.O. box can be found \_\_\_\_\_

**Bank and Credit Card Accounts**

	<u>Name of Institution</u>	<u>Account Number</u>	<u>Phone Number</u>
Savings Account	_____	_____	_____
Checking Account	_____	_____	_____
Other Financial Account(s)	_____	_____	_____
Credit Cards:			
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____
6. _____	_____	_____	_____

Please cancel all of my credit cards immediately and change any joint accounts to single accounts.

My Savings and/or Checking account(s) are also accessed by \_\_\_\_\_ (name of power of attorney/signator)  
 My checkbook can be found \_\_\_\_\_. I also kept canceled checks \_\_\_\_\_.

**Loans**

	<u>Name of Institution</u>	<u>Amount of Loan</u>	<u>Name &amp; Contact Number</u>
Mortgage	_____	_____	_____
Auto	_____	_____	_____
Other	_____	_____	_____

**Tax-Related Matters**

My income tax returns can be found \_\_\_\_\_.  
 With those are copies of gift tax returns, if applicable.

**Insurance-Related Matters**

	<u>Name of Insurer</u>	<u>Policy Number</u>	<u>Name &amp; Contact Number</u>
Life Insurance	_____	_____	_____
Auto Insurance	_____	_____	_____
Homeowners Insurance	_____	_____	_____
Malpractice	_____	_____	_____
Property	_____	_____	_____
Business	_____	_____	_____
Employer-provided insurance	_____	_____	_____

(Don't forget to include policies that have lapsed. They may still have some value.)

**Property Owned**

List all assets you own, and give the location of deeds and titles. Include personal and real property.

Type: \_\_\_\_\_ Location of deed/title: \_\_\_\_\_  
 Type: \_\_\_\_\_ Location of deed/title: \_\_\_\_\_  
 Type: \_\_\_\_\_ Location of deed/title: \_\_\_\_\_  
 Type: \_\_\_\_\_ Location of deed/title: \_\_\_\_\_

**Investments**

List all brokerage accounts and other investment vehicles, such as limited partnerships or interests in real estate. Give the location of brokers' confirmation slips for purchases of securities going back as far as possible in order to establish the cost of securities. If you cannot locate confirmation slips, then at least make a note of transfer dates shown on stock certificates and registered bonds. These dates will allow you to look up the price of the stock.

Provide information on all retirement accounts, including 401(k) plans and IRAs. Indicate your designated beneficiary and describe where statements and beneficiary designation forms are located.

<u>Account Type</u>	<u>Amount</u>	<u>Beneficiary Information</u>	<u>Location of Statements &amp; Beneficiary Forms</u>
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____

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## Employment

Provide a list of all prior employers, no matter how long ago you worked for them. You may be entitled to pension or death benefits. Tell the executor where to find a description of any pension benefits you are entitled to.

Provide the executor with a record of any governmental employment, past or present. For the armed services, include the branch of service, serial number, and approximate dates. You may be entitled to veterans' benefits or survivors' benefits.

<u>Name of Employer</u>	<u>Phone Number</u>	<u>Address</u>	<u>Dates of Employment</u>
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____
6. _____	_____	_____	_____

## Personal Papers

My passport and birth certificate can be found \_\_\_\_\_.

My marriage certificate (if applicable) can be found \_\_\_\_\_.

My divorce decree (if applicable) can be found \_\_\_\_\_.

## Inheritances

I will be receiving an inheritance from \_\_\_\_\_, who died on \_\_\_\_\_ (date of death). Letters from his/her executor can be found \_\_\_\_\_.

## Trusts

I have set forth below information regarding any trusts that I set up while living and any trusts of which I am a beneficiary (including the location of the trust instrument).

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## Money Owed To You

The following debts are owed to me by others:

Name of person/business: \_\_\_\_\_ Amount owed: \$ \_\_\_\_\_

Name of person/business: \_\_\_\_\_ Amount owed: \$ \_\_\_\_\_

Name of person/business: \_\_\_\_\_ Amount owed: \$ \_\_\_\_\_

Name of person/business: \_\_\_\_\_ Amount owed: \$ \_\_\_\_\_

Name of person/business: \_\_\_\_\_ Amount owed: \$ \_\_\_\_\_

## ***Checklist for Survivors***

The following documents are needed to ensure a secure estate after your death:

- \_\_\_\_\_ Copy of will or living trust
- \_\_\_\_\_ Death certificate (get at least 10 certified copies)
- \_\_\_\_\_ Copy of any pre or post-nuptial spousal property agreements
- \_\_\_\_\_ Income tax return (most recent 3 years)
- \_\_\_\_\_ Gift tax returns (any that have been filed)
- \_\_\_\_\_ Current brokerage account statements\*
- \_\_\_\_\_ Copies of property tax bills for real estate owned
- \_\_\_\_\_ Copies of deeds to real property
- \_\_\_\_\_ Copies of checking and CD statements\*
- \_\_\_\_\_ Copies of stock and bond certificates if not held by broker
- \_\_\_\_\_ Copies of life insurance policies or settlement checks if benefits have been paid. Obtain Form 712 from insurance companies
- \_\_\_\_\_ Name and address for limited or general partnership investments
- \_\_\_\_\_ Copies of promissory notes
- \_\_\_\_\_ Copies of any IRA, 401(k), pension or annuity statements\*
- \_\_\_\_\_ Copies of appraisals of real estate, other assets or business owned.
- \_\_\_\_\_ Copies of all vehicle registrations (car, boat, motor home, air plane)
- \_\_\_\_\_ Copies of any leases
- \_\_\_\_\_ List of decedent's debts or debts the decedent was a guarantor or co-signor (include name and address of creditor)
- \_\_\_\_\_ List of funeral expenses
- \_\_\_\_\_ List of heirs or beneficiaries that includes name, age, social security no., address, phone no. and relationship to decedent
- \_\_\_\_\_ List of any collectibles (i.e. artwork, coins, jewelry) owned by decedent
- \_\_\_\_\_ List of safe deposit box contents
- \_\_\_\_\_ Documentation for any other assets owned (i.e. royalty agreements, copyrights, trademarks, patents, franchises)

\* supply documents for month of decedent's death