A FAMILY INFORMATION SHEET

If Something Happens

These are common questions families are asked after a death. Answer them now, so the people you love don't have to guess later. Fill in what you know. Leave anything you're unsure of blank and come back to it.

Filled out by _____

Last updated _____

Copy given to _____

For the death certificate

Information commonly needed

1. Full legal name, and any other names used

2. Where the Social Security card is kept
Write the location only. Never the number.

3. Date of birth, and city and state of birth

4. Father's full name, mother's maiden name

5. Highest schooling, and main line of work

6. Marital status, spouse's full and maiden name

7. Military service, and where the DD-214 is kept

Home address

Making arrangements

What your family will need in the first few days, at the funeral home.

8. Burial or cremation? Any plot or prepaid plan, and where are those papers?

Preferred funeral home or cremation provider, and phone

9. Faith, and any song or reading you'd want

Organ donation wishes

10. Who needs to be called, with their numbers

Call first:

More names? Keep going on the back.

11. How many certified death certificates might you need?

Count the places likely to ask for a certified copy: each insurance company, bank, retirement plan and property transfer. Then ask the funeral director what they recommend. Needs vary by family.

My estimate

Pets, or anyone who depends on you day to day, and who will care for them

Who is legally authorized to make funeral arrangements, and where is that document?

Rules vary by state. Writing a name here doesn't give that person legal authority, and a will or executor alone may not either.

For whoever sits in that chair. Before choosing arrangements, ask the funeral home for its General Price List. Under the FTC Funeral Rule, they must provide it, and you can generally choose only the goods and services you want, apart from the basic services fee and anything required by law.

Where things are

What your family will need to find in the weeks afterward. This page tells them where to look. Never write passwords, Social Security numbers or account numbers on it.

12. Life insurance

Include any coverage through work

POLICY ONE

Company _____

Policy number _____

Beneficiaries _____

Agent, phone _____

POLICY TWO

Company _____

Policy number _____

Beneficiaries _____

Agent, phone _____

Where the will is kept, the executor, and the attorney's phone

_____

_____

Employer or HR contact, for work benefits and final pay

_____

_____

Bank, retirement and pension accounts

Bank or company	Type of account	Phone or contact

Where phone and password access is kept

_____

Where papers are: certificates, deeds, titles, advance directive

_____

WHEN YOU'RE FINISHED

Put this somewhere safe. Hand a copy to the person who would be sitting in that chair for you.

This sheet is for personal planning. It is not legal or tax advice. Store it securely.

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