

EMERGENCY INFORMATION

Financial Information			
List all accounts you have assets in individually and jointly:			
Name of Financial Institution and Account Number	Name on Account and Co-Account holders	Purpose (IRA, Savings, Credit Card, Stocks, etc...)	Are there beneficiaries on these accounts, and if so, whom?
Physical bank and location:			
For IRAs, who are the beneficiaries?			
What accounts also have your children's names on it? Do they have access to your checks?			
Are Trust accounts set up? Where are the trust documents. Are they funded?			
Other Bills / Obligations			
List of property you own? What has lien's; What has a clear title.			
What insurance policies do you own?			
Accountant's name, phone and email.			
Insurance agent's name, phone and email			
Long Term Care Insurance			
Life Insurance			
Financial Advisor			
Safe Deposit Box? Where is key? Have your beneficiaries added to the box.			

Personal Identification Information	
Date of Birth	
Social Security Number	
Drivers License Number, State	
Passport Numbers	
Medicare Numbers	
Supplemental Medicare Company and Number	
Rx Plan Company and Number	
Wedding Anniversary Dates	
Military Records (Where are they located?)	
Branch of Service and Discharge Date	
Where is Pet Documentation? Veterinarian?	
Other Membership Numbers and passwords	
Location of Important Documents	
Birth Certificate	
Marriage Certificate	
Divorce Documents	
Military Discharge Papers (DD Form 214) arrives.gov/veterans or US Dept of Veterans Affairs	
Will, Trust, Health Care Surrogate, Power of Attorney, HPPA,	
Living Will	
Ethical Will	
Previous Tax Returns	
Funeral Information and Wishes	
Hebrew Name including your parents' Hebrew names: (ex: Sarah bat Mordechai v'Rachel)	
Funeral Home Selected, pre-planned (have documents)	
Cemetery Selected, pre-purchased (have documents)	
Funeral Wishes (prayers, poems, music, shiva. Suggest, let mourner's decide, but don't let them guess)	
Funeral Planning and Discussion with Children	
Cremation vs Burial	
Pre-Need Purchase with Funeral Home	

JFPC's Jewish Funeral Package (Casket, Transportation, Documents, Tahara, Refrigeration, Funeral Services, Chapel, Paperwork: \$2880) https://dc.jewish-funerals.org/node/1864	
Cunningham Turch Funeral Home in Alexandria	
Jefferson Funeral Home in Alexandria (not part of Contract)	
Hines-Rinaldi in Silver Spring	
Cemetery	
Purchase plot; Have deed in your documents folder.	
Cemetery charges for cement liner, opening and closing of grave at time of funeral.	
King David (National Memorial; Falls Church) [Judy Seiff sells plots that TRS owns]	
Columbia Gardens (Rt. 50: Arlington)	
Garden of Remembrance (Clarksburg; Owned by Community)	
Monument or Marker	
Pre order	
Decide what you want on it	
Ask Cemetery who they work with on this.	
Military Honors/Burial	
Legal Documents to go over with your attorney; Copies to Children	
Will	
Trust	
HPPA Authorization	
Allowing health care professionals to release info to your family members	
Durable Power of Attorney	
Who will be authorized to sign for you for all things financial and legal?	
Health Care Agent or Medical Power of Attorney	
Who will make health care decisions	
Advanced Directive (Living Will)	
Living Will vs FIVE WISHES	
FIVE WISHES available at TRS or on line: https://store.fivewishes.org/ShopLocal/en/start-page	
Go over FIVE WISHES with children and give them copies	
Dementia Provision: https://www.compassionandchoices.org/docs/default-source/default-document-library/dementia-provision-tool-final-1.19.21.pdf?sfvrsn=d068899c_1	

DNR Form:	
https://www.vdh.virginia.gov/content/uploads/sites/23/2017/12/AuthorizedDurableDNRForm-2017.pdf	
Did you give children copies?	
Ethical Will	
Family photographs	
Recipes	
Items of clothing	
Other objects with great personal (but not necessarily commercial) value	
They can also be used to explain to your survivors your intentions behind the decisions you made in your legal Will , in case you think there may be any confusion or bad feelings.	