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	 :			
Thysical bank and location				
For IRAs, who are the ben	eficiaries?			
What accounts also have you it? Do they have access				
Are Trust accounts set up?	? Where are the trust			
documents. Are they fund	ed?			
Other Bills / Obligations				
List of property you own? has a clear title.	What has lien's; What			
What insurance policies do you own?				
Accountant's name, phone and email.				
Insurance agent's name, p				
Long Term Care Insurance				
Life Insurance Financial Advisor				
	ic kov2 Have your			
Safe Deposit Box? Where beneficiaries added to the				
1		1		

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? Veternarian?				
Other Membership Numbers and passwords				
Location of Imp	ortant 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 w	ith your attorney; Copies to Children
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Will Trust	ith your attorney; Copies to Children
Will	ith your attorney; Copies to Children
Will Trust HPPA Authorization Allowing health care professionals to release	ith your attorney; Copies to Children
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DNR Form:	
https://www.vdh.virginia.gov/content/uploads/	
sites/23/2017/12/AuthorizedDurableDNRForm-	
<u>2017.pdf</u>	
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 <u>legal Will</u> , in case you think	
there may be any confusion or bad feelings.	