

Nothing can diminish the grief that comes with losing a spouse. However, organizing essential documents can allow you more time to focus on the recovery process.

<p>End of Life Preparation</p> <ul style="list-style-type: none"> • Letter of wishes and intentions • Wills, trusts and legal appointments • Final arrangements • Cash flow plan 	<p>Home</p> <ul style="list-style-type: none"> • Deed • Mortgage or rental contract • Property tax statement • Property or renter's insurance • Contact information for repair and maintenance providers • File for all major appliances and warranties • File on major repairs
<p>Financial Documents</p> <ul style="list-style-type: none"> • Keep a list of current accounts including the account numbers and contact information • Bank statements • Brokerage statements • Retirement accounts • Savings accounts • Annuities • Life insurance policies • Social Security benefits • IOUs for money owed to you 	<p>Insurance Policies</p> <ul style="list-style-type: none"> • Homeowners • Rental • Umbrella • Flood • Disaster • Auto • Health • Supplemental • Long Term Care • Disability Income
<p>Tax</p> <ul style="list-style-type: none"> • Last three years of tax returns • Current year income information • Current year deduction information 	<p>Certificates/Official Documents</p> <ul style="list-style-type: none"> • Marriage certificate • Divorce decrees • Birth certificate • Adoption papers • Education related certificates and diplomas • Military discharge • Passports • Copy of driver license • Titles and bill of sale for autos and major items • Social Security cards
<p>Employment</p> <ul style="list-style-type: none"> • Employee benefits • 401(k) • Income statements • Pension benefits • Retirement accounts 	

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