

**SUGGESTIONS ON HOW TO CREATE A DEATH DATA DOCUMENT**  
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On the pages that follow is a suggested OUTLINE which I referred to it in my presentation or recent newsletter article. Every few years I write about this to encourage people to create their own document. It is important. I began my personal death data document in June 1993.

The suggested format to follow starts on the next page.

I encourage you to start immediately and take the time to do this. Provide complete details. Even though you might do this for a close relative, write as if you are writing to someone who doesn't know you or anything about you. Doing this gives you peace of mind, but I guarantee, your relatives will thank you many times over for your efforts. This does not take place of your Will, or your Living Will (this is not official – just useful information for your survivors.)

Suggestion 1: Just copy my format to your computer and substitute your current information in your own words and delete my comments under each topic. Delete categories that do not apply to you and add those that do.

Suggestion 2: I suggest you just store your Master document on your computer. Don't bother to print it. If you do it right, you will be adding to or changing this information several times a year. It would not be unreasonable to do a minor update maybe once a month. It makes no sense to constantly be printing this every time it is revised. If the only copy is on your computer (not recommended. Backup a copy to a flash drive.

Suggestion 3: A better idea, keep your master copy on your computer, but copy it to a flash drive each time you revise it. I recommend you do one flash drive for each child. Store those drives in a folder for each child in your house. Each can then take the flash drive to their own computer and refer to it as needed. Duplicate copies for each child eliminates any arguments about what you said and intend. My kids have never seen my document. I made sure they know about it and their individual folders. We have talked about it several times – I bring the subject up typically once a year.

Suggestion 4: Remember every time you revise the master copy, be sure you copy the revised version to each flash drive for each child.

If you have questions, feel free to contact me.  
Best Regards,

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Central KY Computer Society

# ITEMS TO CONSIDER FOR A DEATH DATA DOCUMENT YOUR NAME

TO BE VIEWED BY RELATIVES AT TIME OF DEATH ONLY

Original Date prepared **date**/ Date updated **date**

## INTRODUCTION: NOTE TO FAMILY MEMBERS:

You may want to start with a note to your relative(s) as to why you have created this document. Be sure to change the date each time you update any information herein.

## VALUABLE PAPERS

Where do you keep your valuable papers or document you discuss herein? List all general places to look.

Bank deposit box?

Fireproof safe? (how do they get access?) (keys)

File cabinet?

## SOCIAL SECURITY NUMBER

My SSN is:-----

Needed by

- Funeral Home
- Armed Forces for benefits
  - If military where is the Form DD214 (Report of Separation from the Armed Forces of the United States) some funeral expenses may be covered.

## BIRTH CERTIFICATE

Location of your birth certificate official copy and photocopies. More than one copy may be useful.

## WILL

Where is the original copy of your will? Do you have more than one original copy? (recommended) Where are they?

Who are your witnesses and how to locate the witnesses? (If they are all deceased or not available, you may want to do a new will)

## **OBITUARY**

Have you written your obituary?  
Location? Picture?

## **FUNERAL ARRANGEMENTS**

If you have made funeral arrangements what are the details?  
Where is the information?

## **BURIAL PLOT**

Have you purchased a cemetery lot?  
Where?  
Status of it?  
Location of deed?

## **HOUSE**

Where is the deed to the house?  
How much did you pay for the house and when did you buy it?  
If renting, where is the rental agreement?  
Where are the tax assessment papers?  
Is there a mortgage? Status?

## **OTHER REAL ESTATE**

Do you own other property? If so, where? Answer same questions found under house above.

## **CAR**

Where are the registration papers on the car?  
Is there a car loan?  
Where is the motor vehicle license?  
Where is the second key fob

## **BANK ACCOUNT(S)**

What bank accounts do you have?  
In what bank(s)  
What are the account numbers? Person to contact at the bank?

Are you a treasurer for any club where you control someone else's money?

Where have you recorded the club/organization account balances? Are they in your computer? Where are the bank statements? To whom should those funds be sent? How do you contact them?

## **BANK LOCK BOX**

Do you have a bank lock box and if so where is it? Where are the keys? (Some banks charge \$150 if the box is closed with no keys)

## **SAVINGS ACCOUNT**

Give information about any savings / money market account you may have. Any gold or silver?

## **DEBTS**

What debts do you have?

To whom?

Where are the papers on them?

## **BANK / DEBIT CARD**

List the bank card you have with a card number.

Who should be contacted if stolen? List a phone number and contact to call.

## **CREDIT CHARGE CARDS**

List, one by one, each of the credit cards in your wallet or purse.

List the number.

List the phone number to call in case the card is stolen.

## **STORE CHARGE CARDS**

Give complete information about any store charge you may have or carry.

How to cancel the card.

## **GASOLINE CREDIT CARD**

Give complete information about any store charge you may have or carry.

How to cancel the card.

## **LOST WALLET**

If your wallet or purse isn't found with you, in addition to canceling credit cards the following agencies should be notified also.

Call the three national credit reporting organizations immediately to place a fraud alert on your name and SSN. This keeps someone from applying for credit via the Internet or other means in your name. The alert means anyone has your personal information will be stopped for doing business in your name. Notify the following organizations of your death to stop a thief in their tracks. The numbers are:

TRANS UNION	1 800 680 7289
EQUIFAX	1 888 397-3742
EXPERIAN	1 888 397 3742
SOCIAL SECURITY FRAUD LINE	1 800 269 0271 10am to 4pm

## **INVESTMENTS**

If you have investments, who handles them?  
 What are the account numbers?  
 Do you keep account of them in your computer?  
 Where are the monthly reports?

## **HOUSE AND OTHER KEYS**

Where do you keep house keys, shed keys any?  
 What keys do you carry with you?  
 What locks do they fit?  
 Any keys hidden outside? Location?  
 Where is the second car key and fob?

## **MORE KEYS**

Do you possess keys to anyone else's house?  
 Where do you keep them? Who should get them?

## **COMBINATION LOCK**

What is the combination to any combination locks you have on hand?  
 Do you have padlocks?  
 Where are padlock keys?

## **PROPERTY SURVEY**

Has your property been surveyed?  
 Where is the survey?

## **INSURANCE POLICIES**

List each insurance policy you have one by one.

List the policy number

List the company which underwrites it.

Phone number and person to contact.

Where are the original policies? (If you don't know, maybe you should apply to the company and ask for a duplicate policy.)

## **HIDDEN CASH MONEY.**

Do you have cash hidden somewhere? (Wouldn't it be a shame if the old sofa was sold for \$100 and you had \$200 in cash hidden in it?)

## **RETIREMENT FUND**

Do you receive any retirement checks?

Will they continue to be paid to beneficiaries?

Who pays them?

Who do you contact?

## **POST OFFICE BOX**

Do you have a Post Office Box?

Number? Location?

Where is the key?

## **PETS**

Discuss the disposition for any pets you may have.

## **TICKETS**

If you have purchased season tickets to stage shows, basketball or football games, where do you keep your unused tickets?

## **COMPUTER PASSWORDS**

Access to your computer

List those that you use the most.

## **PINS**

Needed for websites and other places such as debit cards

## **PAPERS FOR FAMILY MEMBERS**

If you have established file folders for specific family members to have – perhaps some collectables – Old report cards, news clippings where do you keep them?

Things you might like to see happen at your death. (Remember these are not binding unless specifically mentioned in a valid will.)

THIS IS JUST A START. Some of these won't apply to you and perhaps a dozen of others might come to mind that will be needed to add to this list I have provided.

Are there any particular items that you might like to go to a specific child?  
Remember not binding unless in a will.

Husbands and wives should do this together perhaps you might think you know everything about what your mate is doing and has done in his past and you may well be wrong.

Be patient, take your time. Write complete thoughts, don't leave anything to question. Remember you won't be there to answer that question.

Good luck. My best wishes toward your success with this project.

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