

## Personal Affairs Tracker

By filling out this worksheet, you can help family members deal with your personal affairs after you're gone. Be sure to let your loved ones know about this list. It will help them cope with your death and find comfort in knowing your needs and wishes were met. Try to keep it updated and in a safe place. Make sure that only those you trust have access to it.

### Banks, savings and loans Contact Information

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### What needs to be done?

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### Life insurance Company Contact Information

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### What needs to be done?

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**Health Insurance Company contact Information**

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**What needs to be done?**

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**Disability insurance company Contact Information**

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**What needs to be done?**

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**Homeowners' or renters' insurance company Contact Information**

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**What needs to be done?**

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**Burial insurance company Contact Information**

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**What needs to be done?**

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**Unions and fraternal organizations Contact Information**

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**What needs to be done?**

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**Attorney Contact Information**

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**What needs to be done?**

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**Accountant Contact Information**

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**What needs to be done?**

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**Executor of the estate Contact Information**

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**What needs to be done?**

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**Internal Revenue Service Contact Information**

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**What needs to be done?**

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**Social Security office Contact Information**

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**What needs to be done?**

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**Pension or retirement plans Contact Information**

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**What needs to be done?**

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**Department of Veterans Affairs Contact Information**

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**What needs to be done?**

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**Investment companies Contact Information**

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**What needs to be done?**

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**Mortgage companies Contact Information**

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**What needs to be done?**

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**Credit card companies Contact Information**

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**What needs to be done?**

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**All other lenders Contact Information**

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**What needs to be done?**

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**Employer Contact Information**

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**What needs to be done?**

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**Faith or spiritual leader/organization Contact Information**

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**What needs to be done?**

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**Safety deposit box keys and box location**

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**Safe, lock combinations**

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**Location of other important items (such as jewelry)**

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Source: U.S. National Institutes of Health