ESTATE MATTERS

Initial Completion
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When we prepare for our future in advance,

- It reduces the decision-making burdens on those we love.
- It allows our wishes to be implemented.
- It gives us peace of mind.

We all know this is an important job, but exactly what is needed? This document is intended to answer that question.

You have some options for doing this task and filing this information.

a. You can fill out the pages in this booklet and file it.
b. You can fill it out and SCAN the material into a computer.
c. You can fill out an electronic version. Download from MyRVM under Home/Forms.

IMPORTANT:

Since much of this material is very confidential, be sure to file it in a safe place.

Be sure to tell your trustee, trusted family member or friend where you have placed this information.

Review and update this annually – perhaps right after filing your taxes or some other easy to remember time. Consider filling this form out in pencil to facilitate future revisions and be sure to update the revision date on the top of this page after each revision to this package.

This booklet is organized into the following sections:

1. Personal
2. Location of important documents
3. Important Contacts
4. Financial
5. Medical
6. Security
7. Legacy
8. Notifications
9. Resources

DETAILED INFORMATION SECTION

This list is intended to be as inclusive as possible and contains a lot of items that will not apply to everyone. It is meant to be a guide that can help you identify and assemble what will be needed and/or useful in the event that you are no longer available to answer questions.

This section is where you can document your personal information. You should add pages (with reference numbers) as required to this package, and you can also store your appropriate documents in envelopes with this package.

[ ] has been added to the start of each topic to provide a quick method of assessing your progress in completing this document. This area may be used to indicate:

[X] the topic has been completed or
[N/A] the topic has been intentionally skipped.

Section 1: Personal:

1. [ ] Full legal name:
2. [ ] Other names (former names, nick names):
3. [ ] Date and place of birth:
4. [ ] Parents' names, dates and places of birth:
5. [ ] Siblings' names, dates and places of birth:
6. [ ] Education (attach details as a separate page)
7. [ ] Military history (attach details as a separate page)
8. [ ] Previous addresses (attach details as a separate page)
9. [ ] Employers and dates of employment; awards received (attach details as a separate page)
10. [ ] Religious, fraternal, and/or professional groups; awards received (attach details as a separate page)

Section 2: Location of Your Vital Documents
(Original or Certified Copies):

1. ☐ Birth Certificate:
2. ☐ Social Security Card:
3. ☐ Medicare and Other Medical Cards:
4. ☐ Driver's License/ID Card:
5. ☐ Passport:
6. ☐ Marriage Certificate:
7. ☐ Divorce Decree/Settlement:
8. ☐ Citizenship Documentation:
9. ☐ Military ID/Discharge Papers:
10. ☐ Will:
11. ☐ Trust:
12. ☐ Advance Directive:
13. ☐ Living Will:
14. ☐ General (Financial) Power of Attorney:

15. ☐ Durable Power of Attorney for Health Care:

16. ☐ Death Certificates of family members:

17. ☐ Others (Others (Adoption info, State ID card, Legal Guardianship, Conservator):

Section 3: Important Contacts:

List: name, address, phone number, email addresses, deceased?

1. ☐ Parents:

2. ☐ Siblings:

3. ☐ Spouse(s):

4. ☐ Children:

5. ☐ Other Relatives:

6. ☐ Close friends:

7. ☐ Doctors:
   a. Primary Physician:

   b. Dentist:

   c. Eye Specialist:

   d. Other Specialists:

8. ☐ Attorney:

9. ☐ Trustee/executor:

10. ☐ Trust officer:

11. ☐ Financial advisors:

12. ☐ Accountants (Tax and other):

13. ☐ Brokers:

14. ☐ Religious contact(s):

15. ☐ Insurance agent(s):

16. ☐ Healthcare representative(s):

17. ☐ Pet info – vet, diet, vaccination records, guardian, insurance, etc.

Section 4: Financial:

Generate a document that provides an overview of all your financial information.

Assets:

1. ☐ Pension source(s) and contact information (attach details as a separate page)
2. ☐ Military benefits, and contact info (attach details as a separate page)
3. ☐ Brokerage accounts (attach details as a separate page)
4. ☐ Bank checking and savings accounts (attach details as a separate page)
5. ☐ Investments – IRAs, 401(k)s, 403(b), Roth IRA, CDs, stocks, bonds, savings bonds, mutual funds, money market accounts (attach details as a separate page)
6. ☐ Deeds/titles of Real Estate owned (attach details as a separate page)

7. ☐ Insurance policies – type (health, long term care, disability, life, etc.) – company, contact info, amount of benefit, policy number, name of insured, name/contact info of beneficiary (attach details as a separate page)

8. ☐ Accounts Receivable (money you are owed) (attach details as a separate page)

9. ☐ List of automatic payments (including card or bank account) (attach as a separate page)

10. ☐ Inventory and appraisals of valuable personal property (attach details as a separate page)

11. ☐ Vehicle(s) (attach details as a separate page)

12. ☐ Self-storage unit (attach details as a separate page)

13. ☐ Other (attach details as a separate page)

Possessions of unusual value:

14. ☐ Items in your possession that are of unusual or non-obvious value (financial or other). State their location, description, why you consider them to be of unusual value, their provenance, their approximate value, and where they could be donated or sold. (attach details as a separate page)

Liabilities:

15. ☐ Debts (attach details as a separate page)

16. ☐ Mortgage(s) (attach details as a separate page)

17. ☐ Credit/debit Card(s) (attach details as a separate page)

Location of:

18. ☐ Safety deposit box and key:

19. ☐ Checkbook:

20. ☐ Account statements:

21. ☐ Tax records, including copy of most recent tax return:

22. ☐ Savings bonds:

23. ☐ Property Deeds and Titles:

24. ☐ Car title(s), registration and insurance information:

25. ☐ Personal safe, key or combination, list of contents:

Section 5: Medical:

1. ☐ POLST (attach details as a separate page)
2. ☐ Immunizations (attach details as a separate page)
3. ☐ Health Insurance (attach details as a separate page)
4. ☐ Location of medical records (attach details as a separate page)
5. ☐ List of medications taken regularly (attach details as a separate page)
6. ☐ Medical transportation (e.g., Mercy Flights etc.)
7. ☐ Other medical related info:

Section 6: Security:

1. ☐ Access to your Password List

   Storage location if on paper:

   Password manager program and Password to access program:

   Where to find your passwords if they are stored in a file on your computer:

2. ☐ Location and how to access your computer – with a discussion of computer contents (attach details as a separate page)

3. ☐ Location and how to access your cell phone (attach details as a separate page)

Section 7: Legacy:

1. ☐ End of life wishes (attach details as a separate page)

2. ☐ Funeral/Memorial Service (attach details as a separate page)

3. ☐ Burial/Cremation/Donation instructions and information (attach details as a separate page)

4. ☐ Executor, trust officer and/or trustee to notify (attach details as a separate page)

5. ☐ Relatives and friends to notify (attach details as a separate page)

6. ☐ Obituary (if you want to write your own) (attach details as a separate page)

7. ☐ Disposition of personal effects (attach details as a separate page)

Section 8: Notifications (after death):

1. ☐ Credit reporting agencies
2. ☐ Social Security
3. ☐ Banks
4. ☐ Credit cards
5. ☐ Pension/retirement accounts
6. ☐ Insurance companies, e.g., life, home, automobile
7. ☐ POLST Registry
8. ☐ U.S. Dept of Defense (for veterans)
9. ☐ Financial advisor/broker
10. ☐ Tax accountant
11. ☐ DMV
12. ☐ County tax assessor's office where property is owned
13. ☐ Utility accounts
14. ☐ Magazine/newspaper and media subscriptions
15. ☐ Church
16. ☐ Businesses that are paid automatically
17. ☐ Other

Section 9: Resources

Advance Care Planning. https://www.nhpco.org/patients-and-caregivers/advance-care-planning/ Good list of resources.

"Age Page: Getting Your Affairs in Order." National Institute on Aging Information Center. https://www.nia.nih.gov/health/end-of-life

Checklist for My Family, published jointly by the American Bar Association and AARP, guides you through the process of gathering in one place your finances, legal documents, online accounts, wishes about medical care and more. Plus it tells you what you need, why you need it, what's missing and where to get it. Available on Amazon (40% off for AARP members) for around $15 (https://www.amazon.com/ABA-AARP-Checklist-Family-Financial/dp/1627229825)

Everplans. Www.everplans.com – Guides and checklists and publications to help you get everything important organized -- Wills, Life Insurance policies, healthcare documents, pet information, digital accounts, etc. Plus, a digital vault to keep everything in (for a price). Good resources.

National Elder Law Foundation: https://nelf.org/default.aspx Help finding a lawyer specializing in senior law.

"Next Steps: A Guide to Financial Responsibilities Following Loss." USAA Survivor Relations. 1800-292-8294. www.usaa.com. Excellent list of steps to take immediately following a loss.
On writing obituaries: https://www.funeralbasics.org/write-great-obituary/

Oregon Last Will and Testament template: https://eforms.com/wills/oregon-last-will-and-testamenttemplate/

"Preparing for your own Death." https://oktodie.com/ Resources and checklists, not only for your own death but also for the death of another.

Updated Oregon Advance Directive form: https://files.mwapp.net/FILES/97532753.pdf

Wills, Trusts and Elderlaw in Oregon. https://www.osbar.org/public/legalinfo/wills.html

For green burial info: www.greenburialcouncil.org. Willow Witt Ranch, in Ashland. https://theforestconservationburial.org/burial-ground/ Oregon's first dedicated natural burial ground.

Your Right to Make Health Care Decisions in Oregon (DHS 0352 [09/16]): https://files.mwapp.net/FILES/98668996.pdf