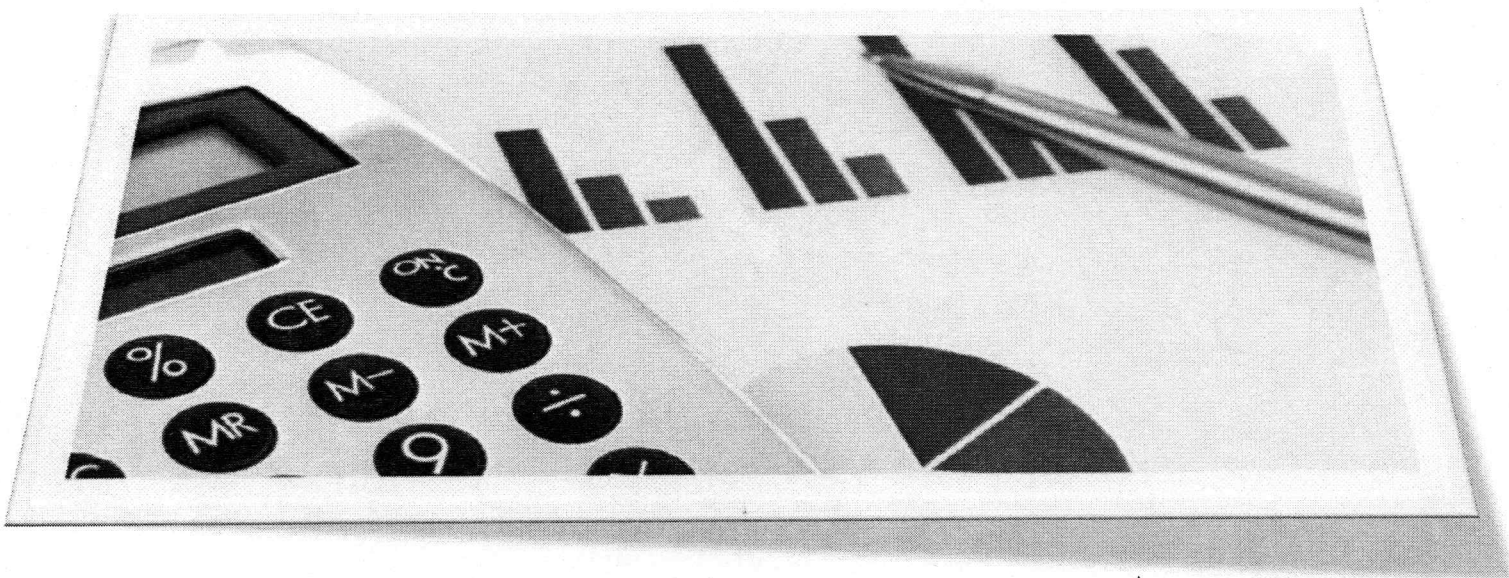


# DEATH DOSSIER

**Comprehensive Financial Inventory**  
Designed to help individuals and families take charge of their  
financial information post death



It isn't enough simply to sign a bunch of papers establishing an estate plan and other end-of-life instructions. You also have to make your heirs aware of them and leave the documents where they can find them. This document will help them to find your financial information and documents. You can also use this for end of life instructions.

**PERSONAL INFORMATION**

	Husband	Wife
1. Full (Legal) Name		
2. Birth City, State Hospital		
3. Birth Date		
4. Marriage Date		
5. Date of Death		
6. Driver's License Number Expiration Date		
7. Passport Number Expiration Date		
8. List other marriages To whom Date of Marriage Date of Divorce		
9. Other		

**LEGAL DOCUMENTS LOCATION**

	Husband	Wife
1. Aadhar Card		
2. Birth Certificate		
3. Marriage Certificate		
4. Death Certificate		
5. Durable Power of Attorney		
6. Statutory Will		
7. Estate Plan		
8. Trust Agreements		
9. Property Deeds		
10. Car Titles		
11. Passport		
12. Other		

**OTHER DOCUMENTS LOCATION**

	Husband	Wife
1. Demat Account Details <i>(Account #, Depository Login Details)</i>		
2. Computer Passwords <i>(Please see Passwords Addendum)</i>		
3. Funeral Wishes & Arrangements <i>(Please see Funeral Arrangement Addendum)</i>		
4. Medical History Prescription Records		
5. Safe Deposit Boxes Documents & Keys		
6. Tax Returns		

**PERSONAL ADVISORS**

	Husband	Wife
Attorney Name Telephone Number		
Attorney Name Telephone Number		
Investment advisor Name Telephone Number		
Investment advisor Name Telephone Number		
Tax advisor/CA Name Telephone Number		
Real Estate Name Telephone Number		
Life Insurance Agent Name Telephone Number		

**Bank Assets  
(Current Account, Savings & FD's)**

	Account 1	Account 2	Account 3	Account 4	Account 5
Name of Account					
Name of Bank					
Account Number					
Type of Account					
Bank Phone Number					
Bank Contact Name					
Authorized Signor(s)					
Location of Checkbook / Statements					
Account User IDs and Passwords					
Automatic Payments Taken from Account					
Approximate Value					
Last Update Date					

**Insurance Policies**  
(Term, Whole Life, Endowment etc.)

	Account 1	Account 2	Account 3	Account 4	Account 5
Name of Company					
Policy Number					
Name(s) on Policy					
Authorized Name on Policy					
Location of Policy					
Payment Amount					
Payment when & How					
Death Benefit / Sum Assured					
Account User IDs and Passwords					
Beneficiaries / Nominees					
Approximate Cash Surrender Value					
Last Update Date					

**HEALTH & OTHER INSURANCE**

	Account 1	Account 2	Account 3	Account 4	Account 5
Name of Company					
Policy Number					
Name(s) on Policy					
Authorized Name on Policy					
Location of Policy					
Premium Payment					
Card Location					
Type of Policy/Benefit					
Account User IDs and Passwords					
Sum Assured					



**PASSWORDS**

**ADDENDUM A**

Type	Description	URL	User Name Password PIN	

Death Dossier

**FUNERAL / BURIAL INSTRUCTION**

You can indicate your wishes here, but those indications are not binding on your family.

I have given instructions regarding my funeral in

\_\_\_\_\_ Letter Other: \_\_\_\_\_

My preference for Funeral / Burial would be

\_\_\_\_\_ Name of Cemetery \_\_\_\_\_ City \_\_\_\_\_

Religious Ceremony to be Perform Post My Death.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Religious Affiliation:

\_\_\_\_\_ List Temple, Mosque or Church \_\_\_\_\_

\_\_\_\_\_ Address \_\_\_\_\_

\_\_\_\_\_ Priest/Imam/Paster \_\_\_\_\_ Phone \_\_\_\_\_