

Quincy Cass Associates, Inc.

Documents to prepare before you pass away

The passing of a loved one is never easy, but you can help to reduce emotional stress for those grieving by having the following information, documents, and instructions prepared in advance.

THE ESSENTIALS:

- Trust documents
- Durable power of attorney (diminished capacity)
- Funeral Arrangements:
 - Contacts (friends, family)
 - Disposition of body
 - Burial instructions
- Liturgy
- Obituary information
- Will

PROOF OF OWNERSHIP

- List of bank accounts / brokerage accounts
- List of username and passwords
- List of safety deposit boxes
- Housing, land, cemetery deeds
- Escrow mortgage accounts
- Proof of loans made & debts owed
- Vehicle titles
- List of partnerships, corporate operating agreements
- Last two years of filed tax returns

HEALTHCARE

- Personal and family medical history
- Medical healthcare power of attorney
- Authorization to release medical Information
- Do not resuscitate instructions (DNR)

RETIREMENT & LIFE INSURANCE

- Individual retirement accounts (IRA)
- 401K accounts
- Pension documents
- Annuity documents

MARRIAGE & DIVORCE

- Marriage license
- Divorce papers

