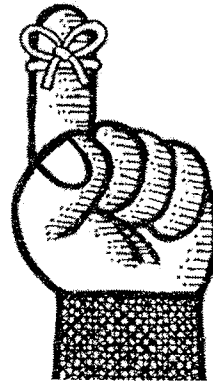


Steps to Peace of Mind

A Checklist



Montgomery Law Office

Attorneys and Counselors at Law
1901 S. Main St. Suite 3
Blacksburg, VA 24060

Phone: (540) 552-1663

Fax: (540) 552-1638

E-Mail: info@jrmattorney.com

Additional Information:

Steps to Peace of Mind

A checklist

<u>Item</u>	<u>Where</u>
1. Advance Medical Directive completed and filed for finding	_____
2. Durable Power of Attorney completed and filed for finding	_____
3. Last Will & testament completed and filed for finding	_____
4. Instructions for Burial/Memorial Service	_____
5. Location of burial/funeral lots, etc.	_____
6. Location of safe deposit box and key	_____
7. Beneficiaries updated on Insurance, Retirement Plans	_____
8. Instructions on where to find:	
a. Deeds (especially out of state/other parts of Virginia)	_____
b. Bonds, stocks, brokerage accounts	_____
c. Pass books for banks and certificates of deposit (CDs)	_____
d. Life Insurance Policies	_____
e. Military Discharge Papers	_____
f. 403, 401K, and IRA(s)	_____
g. Annuities: Civil Service, Military Survivors Benefit Plan	_____
9. Federal and State income tax papers for the last three years	_____
10. Notes of sums owed to you; debts you owe	_____
11. Names and address of relatives to notify	_____
12. Name of your church, synagogue, religious institution	_____
13. Name of funeral director to use	_____
14. List your social security number and full date of birth	_____
15. Location or directions for special disposition on body or parts (e.g. eyes, organ donation information)	_____
16. Information of any Gift Tax Return filed with the IRS	_____
17. For Military Retirees: Survivor Assistance Office-Military Installation	_____
18. E-mail, cellphone, social media passwords	_____
19. Location of vehicle titles	_____