

Resources -- In the Event of My Death

Biographical Information

Full Legal Name: _____ Social Security Number: _____
Date and Place of Birth: _____ Driver's License Number: _____
Address: _____
Military Service (Branch and Dates): _____
Spouse's Name (Current): _____ Spouse's Date of Birth: _____
Spouse's Date and Place of Birth: _____
Former Spouse's Name: _____ Date of Divorce or Death: _____
Former Spouse's Social Security Number: _____ Former Spouse's Address: _____
Children (Name, Date of Birth, Location of Birth, Address): _____

Who to Contact

Fairfax County Retirement Systems: 703-279-8200 TTY: 711 1-800-333-1633 County Life Insurance: 703-324-3351 (The Standard)
Other Retirement Plan: _____ Spouse's Retirement Plan: _____
Life Insurance: _____ Health Insurance: _____
Insurance on Credit Card(s)/Credit Union or Bank Accounts: _____

Other Insurance (Auto, Home, Accident, Long-Term Care, etc.): _____

Attorney: _____ Accountant: _____
Banker: _____ Deferred Compensation: 703-324-4995 (County)
Doctor(s): _____ County Deferred Comp Vendor: T Rowe Price – 888-457-5770
Employer: _____ Executor of Estate: _____
Funeral Director: _____ Landlord (Mortgage Company): _____
Minister/Rabbi: _____ Social Security: (800) 772-1213
Stockbroker: _____ Fraternal Organizations/Clubs: _____
FAMILY MEMBERS AND FRIENDS WHO SHOULD BE CONTACTED: _____

Where My Valuable Papers are Located

Original of My Will (and Spouse's Will): _____
Powers of Attorney/Advanced Medical Directive: _____

Burial Instructions:

Trust Agreements:

Life, Health, Homeowners, Auto and Long-Term Care Insurance Policies:

Birth Certificates (for you, your spouse and children):

Marriage Certificates:

Passport:

Safe Combination:

Safe Deposit Box (location of box and key):

Checking and Savings Account Information:

List of Credit Cards and Lines of Credit:

List of Debts:

List of Stored and Loaned Items:

Titles to Vehicles:

Brokerage Account Records:

Divorce Papers:

Citizenship Papers:

Adoption Records:

Prenuptial/Postnuptial Agreements:

Military Discharge Papers:

Deeds, Mortgage, Title Insurance, Surveys:

Original Purchase Price of Real Estate, Original Purchase Documents:

Business Records:

Tax Records:

Receipts:

Leases:

Stamps/Coins or Other Collections:

Hidden Valuables:

Other: