

Updated on Jun 9, 2017

Preparation Checklist prior to Illness, Accident that incapacitates, Death (Things to know and plan for)

Military

- 1) **LOVE ME BOOK** – (Military Records) make sure someone knows where it is.
 - a) Three important sections Leave and Earning Statement (LES), Medical and Military History. Ex. DD214, NGB 23, LES, and Line of Duty report
- 2) VA status – let someone know if you receive VA compensation/or is in the process
- 3) Medical Insurance – Tricare eligibility/Civilian
- 4) Survivor Benefit Plan (SBP) – have a copy of that and let significant others know.

Civilian

- 5) Medical Insurance – Civilian/CHAMPVA/Medicare/Medicaid
- 6) Survivor Benefit Plan (SBP)/Retirement plan – if there is survivor/retirement plan from a company/OPM, have a copy of that and let significant others know.

Covers for both Military and Civilian

- 7) Marriage, Birth certificate, Death certificates, Adoption papers, and Divorce Decrees
- 8) Life insurance policy – list phone and policy numbers, instructions, payments (if payment is monthly, lump sum), company the policy is under, etc.
- 9) 401K/Thrift Savings Plan (TSP)/Investment papers – Ex. TSP if you have thru military/civilian, cd, bond
- 10) **Legal/Judge Advocate General (JAG) - Updated Will, Power of Attorney (POA), Medical Power of Attorney (POA), Living Will, Guardianship for children/if spouse is incapacitated and Letter of Instructions**
- 11) Name of Banks, Credit Unions, etc. (account numbers)
- 12) Safe-Deposit Box – List contents
- 13) **List of assets and liabilities (ex. Credit cards, loans and whose name is on them)**
- 14) Disposition instructions for the body (Burial, cremation, memorial service, etc.)
- 15) Burial Plot information – example Family plot
- 16) Info required for Death Certificate (date/place of birth, father's name, mother's maiden name, etc.)
- 17) Info required for Obituary notice (names, relation and locations of appropriate relatives, etc.)
- 18) **List of important phone number – ex. For insurance and medical policy**
- 19) **Name of beneficiaries – keep current, have current phone and address**
- 20) List of email and website accounts
- 21) List of memberships in organizations
- 22) List of login ids and passwords for accounts
- 23) Disposition of personal property (pets, jewelry, vehicles)
- 24) Social Security – Ex. Disability, supplemental, death
- 25) Make sure someone that you trust knows where to locate information
- 26) Person taking care of stuff while you are incapacitated or death that they are familiar with your animals

When making this list please realize that when it comes to accounts and passwords there may also be security questions that someone may need to know the answer to. Ex. Where was your father born?

If you have an ex-spouse, and children from ex, please make sure the current spouse is aware of your wishes concerning your children. Please have a trust established or it is documented in will.

If you want certain information given to only certain individuals, example: You do not get along with a parent. Make sure that information is documented. Also state your wishes clearly and make sure people are aware of them.