2

Instructions

This section is the master guide to my planner. It is organized to help you through the first days, weeks, and months following my incapacity or death. The instructions that follow will remind you of the important tasks for each phase and tell you where to look in my planner for the additional information you will need.

Most of the tasks listed here will apply whether I am incapacitated or have died, though how you handle an individual task may vary depending on the circumstances. If I am incapacitated, however, there are two important tasks you'll want to take care of immediately. These are listed just below.

If I Am Incapacitated

Review Health Care Directives **Applicable:** ☐***Yes*** ☐***No***

☐ **Health Care Directives.** Turn to Section 11 for information about documents I have made to direct my health care.

Review Power of Attorney for Finances **Applicable:** ☐***Yes*** ☐ ***No***

☐ **Durable Power of Attorney for Finances.** Turn to Section 12 for information about the document that names someone to manage my finances for me.

Days 1 and 2

These are some of the important tasks you will have to handle in the first 48 hours following my incapacity or death.

Care for Children ***Applicable:*** ☐ *Yes* ☐ *No*

☐ **Children.** Turn to Section 4 for details about the children who rely on me for care.

Care for Others ***Applicable:*** ☐ *Yes* ☐ *No*

☐ **Others Who Depend on Me.** Turn to Section 5 for details about other people who rely on me for care.

Care for Animals **_Applicable:_** ☐ *Yes* ☐ *No*

☐ **Pets and Livestock.** Turn to Section 6 for information about taking care of my animals, including my wishes for placing them with others.

Contact Employer **_Applicable:_** ☐ *Yes* ☐ *No*

☐ **Employment.** Notify my employer of my incapacity or death. See Section 7 for contact information and other details about my current employment and my employment history.

Contact Business **_Applicable:_** ☐ *Yes* ☐ *No*

☐ **Business Interests.** Notify any business partners or key employees of my incapacity or death. See Section 8 for contact information and details about my current and former business interests.

Make Final Arrangements

After my death, please review the next four items before making any final arrangements.

☐ **Arrange for the Death Certificate.** Those in charge of handling my estate will need certified copies of my death certificate to wrap up business with insurance companies, banks, the Social Security Administration, and others.

As you make arrangements for the disposition of my body, you will be asked to provide information for the death certificate. The Biographical Information section of my planner (Section 3) contains the information you will need. At this time, you should request multiple certified copies of the death certificate; you may need as many as ten.

If for any reason you are unable to request copies of my death certificate while making final arrangements, you can get them later, from the county in which I died. Contact the County Health Department for more information. (In some counties this office may go by other names, such as the Bureau or Office of Vital Statistics or the Office of Vital Records and Health Statistics.)

It's often possible to request copies of death certificates online. To find out your options, go to the county website. You can usually find it by using this formula, substituting the state postal abbreviation for "XX": http://www.co.[COUNTY_NAME].[XX].us. For example, you can find the website for Arapahoe County, Colorado, at http://www.co.arapahoe.co.us.

☐ **Organ or Body Donation.** Turn to Section 13 for my wishes about donating my body, organs, or tissues—as well as information about any plans I have already made.

☐ **Burial or Cremation.** Turn to Section 14 for details about burial or cremation, including my wishes and information about any plans I have already made.

☐ **Funeral and Memorial Services.** Turn to Section 15 for details about my funeral, memorial, or related services, including my wishes and information about any plans I have already made.

☐ **Protect the House.** My obituary or death notice may serve to alert thieves that the house is empty. If necessary, arrange for a neighbor, a familiar service provider (see Section 10), a church member, or the reception caterer to be at the house during services.

Publish Obituary ***Applicable:*** ☐ *Yes* ☐ *No*

☐ **Obituary.** Turn to Section 16 for details about publishing my obituary.

Contact Family and Friends

☐ Contact all friends and relatives who should know of my incapacity or death.

If you will hold a funeral or memorial service in the next few days, contact everyone who might attend. (See Section 15 for my wishes about whom to invite.) Others will learn of my passing only by reading the obituary, if published.

Except for those who need to know about my death right away, it will help to make any arrangements for services before you make phone calls—then you won't have to call everyone twice.

You can find names and contact information for family and friends in the following locations:

Review Appointment Calendar

☐ Review my calendar and cancel any scheduled appointments. You can find my calendar in the following locations:

Additional Notes

Week 2

This section outlines the essential tasks you should handle in the two weeks following my incapacity or death.

Locate Will or Other Estate Planning Documents

☐ **Will and Trust.** After my death, see Section 17 for information about my will, trusts, or other estate planning documents that I have made.

Contact Organizations and Service Providers

Please notify financial institutions, brokers, government agencies, and others with whom I do business that I have become incapacitated or have died. The following sections will help you:

☐ **Insurance.** Turn to Section 18 for information about my insurance agents and policies. The information there will help you claim benefits, cancel, or continue coverage as appropriate.

☐ **Bank and Brokerage Accounts.** Turn to Section 19 for financial institution contact information and details about my bank and brokerage accounts.

☐ **Retirement Plans and Pensions.** Turn to Section 20 for information about my retirement and pension plan accounts, including contact information for the administrators.

☐ **Government Benefits.** Turn to Section 21 for details about my Social Security and other government benefits, including contact information for each agency.

☐ **Service Providers.** Turn to Section 10 for information about service providers, including medical, personal, and household care providers.

☐ **Other:**

☐ **Other:**

☐ **Other:**

Review Current Bills and Accounts

☐ **Credit Cards and Debts.** Please review my current bills to be sure they are paid on time. Cancel and close accounts as necessary. See Section 22 for more information.

☐ **Secured Places and Passwords.** Turn to Section 23 for help with locked or password-protected products, services, and accounts.

Additional Notes

Month 1 and Beyond

Following is a list of tasks that you should initiate in the first month or two following my incapacity or death.

Take Inventory

☐ **Real Estate.** Turn to Section 25 for details about any real estate that I own or rent.

☐ **Vehicles.** Turn to Section 26 for information about all vehicles that I own.

☐ **Other Income and Personal Property.** Turn to Section 27 for information about important sources of income or items of personal property not described elsewhere in my planner.

☐ **Other Information.** See Section 28 for any other details that I feel you need to know.

Cancel Memberships

- ☐ **Memberships.** Over time, you will want to cancel my memberships with various organizations. See Section 10 for contact information.

Prepare Tax Returns

- ☐ **Taxes.** Section 24 will help you gather the information you need to prepare my final tax returns.

Additional Notes

Where to Get Help

As you work through the steps you must take to wrap up my affairs, you will find a number of sources for help. Where applicable, the various sections of my planner list lawyers, accountants, or others who can help with each task.

For general guidance, you may want to visit www.budmanlaw.com. You may also wish to contact Brian Budman at 303-217-2018.