Guidance for my loved ones

IN THE EVENT OF MY DEATH

BOK FINANCIAL
ADVISOR TRUST SERVICES

I understand that the death of a loved one is a difficult and emotional time. There are many things to be done, as well as financial and personal issues to be addressed. This can seem overwhelming without some guidance and a plan of action. I have provided this checklist to help you organize the actions that need to be taken upon my death.

1. PLEASE CONTACT THE FOLLOWING AS SOON AS POSSIBLE.

Attorney:

Phone number: Firm:

Address:

Trustee:

Phone number: Company:

Address:

Other advisors to be contacted are listed on attached sheet.

2. LOCATE MY IMPORTANT DOCUMENTS.

My **WILL** is located:

My **TRUST** is located:

A list of where other important documents can be found is attached.

My real estate and personal property will need to be secured. My attorney and trustee can provide assistance with that. The property will ultimately be appraised and distributed as set forth in my Will/Trust. Do not distribute any of my property without the approval and assistance of my attorney and my trustee.

While other financial matters will eventually need to be addresses, it is unlikely that any financial decisions will be made immediately. Important and significant tax implications may result from any financial decisions. Therefore, I ask that you not make any financial decisions until you consult my attorney, trustee and financial advisor.

3. MAKE MY FINAL ARRANGEMENTS.

- ☐ I am / ☐ I am not an organ donor. Please take the necessary steps to ensure my wishes are met.
- ☐ I have written down instructions regarding my funeral/memorial service. Instructions are located:
- ☐ I desire to use the following funeral home or memorial society:
- ☐ I have prepaid my funeral expenses. Please contact:
- ☐ I am entitled to VA burial benefits. Please contact:

4. PLEASE MAKE THE FOLLOWING ARRANGEMENTS FOR MY PET(S):

5. MY USERNAMES AND PASSWORDS ARE AS FOLLOWS:

Item/Account	Username	Password
Alarm/Security system		
Computer		
Online banking		
Mobile phone/Voicemail		
Email		
Email		
Facebook		
X / Twitter		
Netflix		
iTunes		
Amazon		

6. ADVISORS TO BE CONTACTED:

Financial advisor:	
Firm:	Email:
Mobile phone:	Work phone:
Address:	
Accountant:	
Firm:	Email:
Mobile phone:	Work phone:
Address:	
Employer:	
Firm:	Email:
Mobile phone:	Work phone:
Address:	
Clergy:	
Firm:	Email:
Mobile phone:	Work phone:
Address:	
Life insurance agent:	
Firm:	Email:
Mobile phone:	Work phone:
Address:	
Property insurance agent:	
Firm:	Email:
Mobile phone:	Work phone:
Address:	
Other:	
Firm:	Email:
Mobile phone:	Work phone:
Address:	

7. OTHER PEOPLE TO BE CONTACTED:

Name:	Relationship:
Phone:	Email:
Address:	
Name:	Relationship:
Phone:	Email:
Address:	
Name:	Relationship:
Phone:	Email:
Address:	
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8. IMPORTANT ITEMS TO BE LOCATED:

Item	Location
Bank statements	
Investment statements	
Stock certificates	
Life insurance policies	
Deed	
Mortgage information	
Income tax returns	
Gift tax returns	
Car titles	
Birth certificate	
Marriage certificate/divorce papers	
Credit card information	
Partnership agreement	
Corporate documents	
Safe deposit key	
Extra house key(s)	
Time share information	