

MEMORANDUM OF

The following information is meant to assist the executor of my estate and my family in carrying out my burial arrangements upon my death and/or to assist in clearing up all my matters at the time of my death.

1. Information needed for my death certificate:
 - (a) Length of time I resided in Texas: _____
 - (b) My full name, preferably as shown on my birth certificate:

 - (c) My date of birth: _____
 - (d) My occupation: _____
 - (e) My birthplace: _____
 - (f) My citizenship: _____
 - (g) My father's name: _____
 - (h) My mother's maiden name: _____
 - (i) My dates of military service (if applicable); _____

(The remaining information needed for the death certificate cannot be obtained until the date of death)

2. Any specific instructions pertaining to my burial (such as giving my body to science, cremation, full military honors, etc.)

3. If a mortuary has been selected, give the address and the telephone number:

4. Any pre-arrangements for burial services (if applicable):

5. Is there any burial insurance? If so, with what company and where is the policy? _____

6. Is there a cemetery plot? If so, give the name of it, where it is located, and in whose name: _____
7. If applicable, the deed to my cemetery plot is located: _____
8. If applicable and if possible, please perform the following type of service at the following religious institution: _____

9. With regards to my obituary, the names of my immediate family, the organizations, business and professional positions I have held, the colleges I attended, degrees received, achievements, fraternal organization memberships are as follows:

10. Name, address and telephone number of the executor of my estate:

11. About my Will:
- (a) My original Will is located: _____
 - (b) The date of execution of my original Will was: _____
 - (c) A copy (ies) of my Will is/are located: _____
 - (d) My spouse does _____ / does not _____ have a Will.
 - (e) If applicable, my spouse's Will is dated: _____
 - (f) If applicable, my spouse's Will is located: _____
 - (g) If applicable, copies of my spouse's Will are located: _____
12. My insurance policy information (if applicable):
- (a) Life insurance agent's name and telephone number: _____
 - (b) My life insurance policy is located: _____

(c) My life insurance policy company, number, coverage amount and beneficiaries are:

(d) If applicable, my spouse has ____ does not have ____ life insurance.

(e) If applicable, my minor child has ____, does not have __ life insurance.

(f) If applicable, my other insurance policy information is as follows:

13. If applicable, the extra key to my safe deposit box is located: _____

14. Important names and telephone numbers:

(a) Attorney: _____

(b) Trustee: _____

(c) Accountant: _____

(d) Financial Planner: _____

(e) Guardian for minors, if applicable: _____

15. Other personal data:

(a) My social security number: ____ - ____ - ____

(b) My date of marriage _____ / date of divorce _____

(c) Location of my marriage certificate and/or divorce documentation:

(d) Location of my family's birth certificates: _____

(e) Location of my passport, naturalization papers, educational records, Employment records, military papers, etc. _____

16. Other important financial information:

(a) Sponsors of, and pertinent information about, any of my retirement, profit-sharing or pension plans: _____

(b) Market value, location of title and mortgagee's name with regards to any real property I own or in which I have an interest:

(c) Names, addresses of my banks and my account numbers at such banks:

17. The names, addresses and telephone numbers of the people whom I wish to be notified of my death are as follows:

18. List of email and web accounts and memberships with passwords:

ITEM	LOCATION
Birth Certificate	
Marriage Certificate	
Pre-Nuptial Agreement	
Post-Nuptial Agreement	
Divorce Decree	
Separation Agreement	
List of heirs and other relatives	
Military service records	
Social Security card	
Medical records	
Will (original and copy)	
Previous wills	
Spouse's will	
Tax records	
Life insurance policies	
General insurance policies	
Stocks	
Bonds	
Notes receivable	
Mortgages receivable	
Deeds	
Leases	
Estate inventory	
Bank records	
Trust instruments	
Business agreements	
Cemetery deeds	
Financial records	
Employee Benefit Plan records	

