

In the event of an emergency or an unexpected sudden death in the family, it's best to be prepared as much as possible ahead of time. Attached are a number of checklists and information sheets that you should prepare and share with your spouse and family. Don't put off considering and preparing for some of these things, even though it's easier not to think about them until they occur.

WHY DO I NEED A "PERSONAL AFFAIRS RECORD"?

Most employees/retirees do not have their affairs in order.

Some employees/retirees are reluctant to share personal information.

It is important for someone to be aware of your assets and liabilities.

It is important that you have a health care agent to make medical decisions for you if you are not able to make them yourself.

It is very important that someone is aware of your desires with regard to your funeral arrangements.

It is important for your spouse/domestic partner to know whom to contact and how to contact them in the case of an emergency or death.

It is important that someone is aware of special needs of children or your pets.

It is important for your family to know about your wishes to donate any organs.

Ask for your retirement committee chair from the International Association of Machinists, Local Lodge 2930 to call for when any additional information or support is needed. (724)544-6113

Things To Be Done at the Time of Death

1. Decide on time and place of funeral or memorial service(s).
2. Make a list of immediate family, close friends, and employer, business colleagues and Local Lodge 2930. Notify each by phone or email if possible.
3. If flowers are to be omitted, decide on an appropriate memorial to which gifts may be made (such as a church, library, school, or some charity).
4. Write obituary. Include age, place of birth, cause of death, occupation, college degrees, memberships held, military service, outstanding work, list of survivors in immediate family. Give time and place of service. Deliver in person, or email to newspapers.
5. Notify insurance companies by email or phone.
6. Allow members of family or close friends to take turns answering the door or phone, or emails, keeping careful record of all contact that was made.
7. Arrange appropriate childcare.
8. Coordinate the supplying of food for the next few days.
9. Consider special needs of the household, such as cleaning, etc., which might be done by friends.
10. Arrange hospitality for visiting relatives and friends.
11. Select pallbearers and notify. (Avoid men with heart or back difficulties. Make them honorary pallbearers.)
12. Notify lawyer and executor of the Will, as well as any Trusts.
13. Plan or disposition of flowers after funeral. (Hospital, rest home and families)
14. Prepare list of distant persons to be notified by letter, phone, or email and/or printed notice, and decide which to send each.

15. Prepare copy for printed notice, if one is wanted.
16. Prepare list of persons to receive acknowledgments of flower, calls, etc. Send appropriate acknowledgments. (Can be written notes, printed acknowledgments, or some of each)
17. Check carefully all life and casualty insurance and death benefits, including Social Security, credit unions, trade unions, fraternal and military, credit cards and life insurance policies. Check also on income for survivors from those sources.
18. Check promptly on all debts and installment payments. Some may carry insurance clauses that will cancel them. If there is to be a delay in meeting payments, consult with creditors and ask for more time before payments are due.
19. If deceased was living alone, notify utilities and landlord and tell the Post Office where to send mail.
20. In the event of death in the family, make sure that the survivors apply for any and all benefits they think they might be eligible for.
21. Apply immediately for Social Security benefits as a \$255 + lump sum is payable to the surviving spouse for funeral benefits. If there are surviving minor children, apply for their benefits also. In order to apply for benefits, you will need to deceased Social Security Card.

A Checklist for your Family

Attached are a number of checklists and information sheets that should be used in the event of an emergency or sudden death in your family. This information should be readily available to your loved ones.

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Your employee file number: \_\_\_\_\_

Your company's present / last address code: \_\_\_\_\_

Your present / last team leader's name and work phone number:

\_\_\_\_\_ / \_\_\_\_\_

Your present / last manager's name and work phone number:

\_\_\_\_\_ / \_\_\_\_\_

Admin's name and phone number:

\_\_\_\_\_ / \_\_\_\_\_

Other employers names and phone numbers:

\_\_\_\_\_ / \_\_\_\_\_

\_\_\_\_\_ / \_\_\_\_\_

~~~~~  
Children / Parents / Significant others names and phone numbers:

_____ / _____

_____ / _____

_____ / _____

_____ / _____

_____ / _____

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If there is a death in the family and the deceased has donated any organs: \_\_\_\_\_

Location of consent papers: \_\_\_\_\_

Who to contact: \_\_\_\_\_

Emergency notification names and phone numbers:

\_\_\_\_\_ / \_\_\_\_\_

\_\_\_\_\_ / \_\_\_\_\_

**Financial / Personal Information Checklist (for you & spouse)**

Full names: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_  
Date of birth & location of birth certificate (make sure your copies have the raised or embossed seal on them. Keep 3 or more on hand as in the event of death, you will need them): \_\_\_\_\_

\_\_\_\_\_  
Date, Place, and location of marriage certificates: \_\_\_\_\_

\_\_\_\_\_  
Name & date of any prior marriages & locations of settlement papers: \_\_\_\_\_

Names / Addresses / Date of Birth, Death / of your children:  
(have available embossed seal birth certificates of children) \_\_\_\_\_

\_\_\_\_\_  
Names / Addresses of parents: \_\_\_\_\_

\_\_\_\_\_  
Names / Addresses of siblings: \_\_\_\_\_

~~~~~  
Social Security Number: _____ / _____ / _____

Location of Social Security card: (it will be needed when dealing with the SS Office) _____

Your company records are only a part of your total personal financial status. Your own insurance policies, investments and plans for the future are important components of your total financial standing. You may want to use the "notes" sections of this booklet to record other data related to your situation. These records can be a useful reference for your beneficiaries to identify your insurance carriers, policy numbers, and location of policies. In addition you may wish to include the following information:

Location of my Will, Trust or Living Trust: _____

My executor: _____

My attorney: _____

Location of safety deposit box: _____

PERSONAL SAVINGS AND INVESTMENTS

Location and identifying numbers: _____

Location of important documents (bank accounts, title to property, deeds, etc.):

Location of Will (a lawyer is not necessary to handle the details of your estate, although it may make it less of a burden for the survivors if all the information is gathered together ahead of time. Some attorneys will offer a one-time consultation for a minimum fee in the event of a death in the family): _____

Bank accounts – savings / checking / credit cards / any other: _____

Securities (Stocks / Savings Bonds / etc.): _____

IRA Accounts Invested with: _____
Location of IRA papers: _____

401K Plan Invested with: _____
Location of 401K plan papers: _____

Savings Bonds: Current Value: \$ _____ Number of bonds: _____
Bond numbers: # _____ # _____ # _____
Location of Bonds: _____
Life Insurance Policies: _____

Credit Union Information:

Password: _____ Account number: _____

(Savings): _____
(Loans): _____
(Checking): _____

Fraternal Organizations (church groups, Masons, Unions etc.):

Veteran benefits (discharge papers may make one eligible for certain funeral benefits): _____

Automobile ownership & insurance information: _____

Real estate property (legal description of your property, the exact name in which you hold title to the property & mortgage company): _____

Home / Personal property insurance information: _____

Safety deposit box & location of key: _____

Credit card information: _____

Monthly bills that need to be paid (how much, to whom and date they need to be paid):

Home mortgage: _____

Property taxes: _____

Car payment: _____

Insurance policies:

Life insurance: 1. _____
2. _____

Medical insurance: _____

Hospital: _____

Address: _____

Doctor's name: _____

Dental insurance: _____

Dentists name and address: _____

Some credit card companies, checking accounts, automobile insurance policies, automobile road service agencies (CSAA) may have small life insurance policies added to them. Check everything and ask questions.

Tax consultant name and phone number: _____

Tax records location: _____

Miscellaneous information: _____

Vital Statistics & Historical data

Name: _____

Address: _____

Birthplace: _____ Date of birth: _____

Occupation (or retired from): _____

Union membership: _____

Never married: _____ Married: _____ Widowed: _____ Divorced: _____

Spouse / Domestic Partner of: _____

Parent of: _____

In city since: _____ Citizen of: _____

Name of parents: _____

If veteran, name of war or unit: _____

Education: _____

Date & place of services: _____

Miscellaneous information: _____
