**"Checklist To Complete Long Before You Need It"**

**created by Robynne Pendariès**

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**1 - EMERGENCY CONTACTS**

1. **Who are the family members to contact in case of an emergency (name, land line and cell phone numbers)?**
2. **Who are the friends/neighbors/people with house keys to contact in case of an emergency (name, land line and cell phone numbers)?**

**2 - CODES**

1. **What is the code for the house/apartment alarm to enter the house?**
2. **What are the contact details for the alarm company?**
3. **Who has access to the house/apartment alarm codes?**
4. **What is the code to access your computer?**
5. **What is the code to access your smartphone (code when you turn on the phone, then second code which could be called SIM or PIN)?**
6. **What are the codes to access your household utilities accounts?**
7. **What are the codes to access your online Social Media accounts?**
8. **What is the code to access your email account (as well as the password, recovery email and phone number)?**
9. **What are the credit card codes for the cash machine (cards in each country)?**
10. **What is the code to access the “password access” website, such as “OnePass”?**
11. **What is your login/password to access your Paypal account?**
12. **What are the access codes for your Frequent Flyer programs?**
13. **What are the codes to access your "cloud" computer storage?**
14. **What is your "Apple ID" for those with an Iphone ?**
15. **What is the code to access our safe inside the house?**

**3 - VITAL DOCUMENTS**

1. **Where are the passports located?**
2. **Where are the birth certificates located?**
3. **Where are the copies of the passports/birth certificates/ID cards located?**
4. **Where are the household bills located?**
5. **What are the last 4 digits, the expiration date, and the CVV code of your credit card(s)?**
6. **Where is our marriage certificate located (foreign/American)?**
7. **Where are the death certificates of loved ones located?**
8. **Where are the divorce judgement papers located?**
9. **Where is a copy of your resident card, ID card and/or citizenship papers located?**
10. **Where is the “registration” for the car and/or motorcycle located?**
11. **What is your mother's maiden name?**
12. **Did we create a document regarding guardianship for our child/children?**
13. **Where are the documents declaring "guardianship" located?**
14. **Where are any and all "hidden stashes" located in the house?**
15. **What are your American Social Security numbers?**
16. **Where are the American Social Security cards located?**
17. **What are the contact details for your accountant (name, telephone number, website)?**

**4 – NOTARY/LAWYER**

1. **What are the contact details in USA and/or foreign country where we are living for lawyer, accountant, insurance agent (and policy numbers)?**
2. **Where is the original “deed/title” for any property/properties located?**
3. **Where is the foreign and/or American “testament” or “Will” located?**

**5 - HEALTH**

1. **What are the local Health Insurance numbers for all family members?**
2. **What is the mailing address of your local Health Insurance, and the Internet access codes**?
3. **What is the name/contact information of your general practitioner?**
4. **What is your Medicare number?**
5. **What are the contact details for Medicare/private health insurance in the States?**
6. **What is the contract number, contact details, and Internet access codes of your complimentary health insurance?**
7. **Do we have a "death insurance" policy within the complimentary health insurance contract?**
8. **Do we have an American DNR: “Do Not Resuscitate” document, a.k.a "living will"?**
9. **Where is our DNR/"living will" document located?**
10. **Do we have an American "MOLST" (Medical Orders for Life-Sustaining Treatment) or "POLST" (Physician's Orders for Life-Sustaining Treatment)?**
11. **Where is the "MOLST" or "POLST" located?**
12. **Have you named a "healthcare proxy"?**
13. **Where is this "healthcare proxy" document located?**
14. **If you have no living children, have you named a « legal guardian » for yourself or your partner?**
15. **Where are the papers naming a “legal guardian” located?**
16. **If you need to be in a care facility, do you want it to be public or private?**
17. **If you need to be in a care facility, in which country do you wish the care facility to be located?**
18. **Do you have a list of preferential care facilities?**
19. **Did you sign a "power of attorney" for medical issues?**
20. **Are you/we organ donors?**
21. **Where is the organ donor document/card located?**
22. **Where are your medical records kept (lab results, x-rays, etc)?**

**6 - FINANCES**

1. **Where are all of your bank statements located?**
2. **What are your bank’s contact details?**
3. **What are all of the investment/bank account numbers?**
4. **Where is the mortgage contract located?**
5. **What are the contact details for the "death policy" (found on the mortgage contract)?**
6. **What are the Internet access codes for all bank accounts?**
7. **Which cell phone number is being used to receive codes/notifications?**
8. **Who has “Power of Attorney” for your bank accounts?**
9. **Where is the “Power of Attorney” located?**
10. **Where is the P.O.D (Payment On Death: beneficiary designation for all monies) located?**
11. **What are the codes for your Credit card/Debit card for the bank machine?**
12. **Do we have a “life insurance” contract?**
13. **Who is the named beneficiary of the ”life insurance” contract?**
14. **Where are the “life insurance” papers located?**
15. **Do we have a safety deposit box at the bank?**
16. **What is the box number of the safety deposit box?**
17. **What is the address of the bank where the safety deposit box is located?**
18. **Where is the key for the safety deposit box located?**
19. **Where are the tax declarations (USA and foreign) located?**
20. **What is your login info for American online tax declarations?**
21. **What is your login info for foreign online tax declarations?**

**7 - EMPLOYMENT**

1. **Where are your pay slips located?**
2. **Where are your papers concerning employee investments/stock options located?**
3. **Where are all other papers concerning your status as an independent contractor located?**
4. **Where is your “retirement notification” located?**
5. **What are the contact details for your Retirement accounts?**
6. **What are the account numbers for your Retirement accounts?**
7. **Where are your papers concerning USA pension located?**
8. **Where is your American Social Security card located?**

**8 - FURRY FRIENDS**

1. **What are the contact details of your veterinary surgeon?**
2. **Where is your pet's "health passport" and ID papers?**

**9 - FUNERALS**

1. **Are there funeral arrangements already organized and paid for?**
2. **Where are the papers for the funeral arrangements located?**
3. **Do you want to be buried or cremated?**
4. **Do you want to have a religious service?**
5. **Do you already have a cemetery plot reserved?**
6. **Where are the papers regarding the cemetery plot located?**
7. **In which country would you like to be buried?**
8. **Where are the military discharge papers located (required for a military burial)?**
9. **If you wrote an obituary, where is it located (and who do you want it sent to)?**
10. **Do you have a list of people that you would like to be informed at the time of death?**

**These questions and answers should be filled out by BOTH individuals in the couple, ideally as two separate documents. Make a copy and sit down at a quiet moment, either with your spouse, your parents or with your children. The subjects may be difficult or uncomfortable to broach, but this checklist is VITAL for eliminating the stress of your loved ones in case of becoming incapacitated or death. When you are finished, tell your spouse where you will keep the document, send the document to your children or another trustworthy organized person such as a lawyer or notary (in some countries), and then put the piece of paper in a safe (but easily accessible) place. Pray you won't need it for a very, very long time!**

If you prefer to complete an electronic copy of this Checklist, here are some tips for storing this:

1 - Do not store it on a computer or device which connects to the internet (beware of hackers, ransomware, email pirates...)

2 - Ideally, print out the filled-in version and then delete the computer file. Keep the printed copy only.

3 - If you MUST have an electronic version, save it on a USB key and delete the file from your computer. Then keep a printout as well as the USB key. USB and computer storage doesn't last for years. Don't forget to add to the above Checklist exactly where you store the USB key!

4 - Never email it to yourself or anybody else, unless the file is encrypted. The file must be encrypted, if you decide to store it on a computer (especially one which connects to the internet). Google 'encryption software for Mac' or 'for Windows', find something you trust, download and use it. CNIL recommends VeraCrypt (<https://www.veracrypt.fr/>). You may need to update encryption software over the years.

This Checklist assembles so much data of interest to hackers and for identity theft, and it's difficult to continually keep it safe for decades on end. A paper copy in your home is safest. There are more criminals out there on the internet than walking through your home. Really.

In addition, you can find more detailed information about many of these important subjects in the upcoming AAWE publication of "Vital Issues".

Finally, I would recommend creating a reminder for yourself (electronic calendar or hand-written) to update this checklist once a year. There are a few categories which will need to be updated occasionally, such as CODES.

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