



TriUnity Foundation

Uniting Hearts for Hope, Healing, and Strength

Be Prepared Checklist

☐ Life Insurance

- Term policy
- Whole life policy
- Employer life insurance plan
- List direct beneficiaries

☐ Update Beneficiaries Annually

- Checking, savings, CDs, life insurance, investments, retirement plans, health savings plans, etc.

☐ Create List of Contacts

- Financial institutions, investments, credit cards, loans, utility accounts, safe deposit boxes, doctors, insurance companies, retirement plans, college savings plans, student loans, etc.

☐ Review Property Titles and Deeds

- Checking, savings, CDs, life insurance, investments, retirement plans, health savings plans, etc.

☐ Location of Important Documents

- Safe deposit box and key
- Birth certificates
- Last will and testament
- Trust documents
- Property deeds
- Income tax records
- Auto registration/title
- DD214 and other military documents

☐ Review Joint Accounts and Loans

- Are Primary/Joint accounts & loans correctly titled?

☐ Create a Living Will and/or Trust

- Especially if you have dependents
- Power of Attorney
- Power of Health
- Executor
- Beneficiaries
- Avoid probate!

☐ Passwords, Important Apps and Other "Need to Knows"

- Phone passcodes
- Apple IDs
- PayPal
- Social Media Profiles
- Crypto Money Apps, Venmo/Cash Apps
- Online Banking
- Wi-Fi Password

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☐ Pre-Arrangements

- Funeral, burial or cremation planning
- How will it be paid
- Make the decisions now

☐ After Death

- Notify funeral home
- Social Security: Lump Sum Death Benefit
- Social Security: Survivor Death Benefit
- Death Certificates: 5 to 10 copies
- Notify life insurance companies
- Contact credit bureaus
- Contact financial institutions
- Medical bills- verify they were submitted to insurance
- Keep cell phone & email going for 6 to 12 months

This list is non-exhaustive, and other scenarios not listed may also apply depending on individual circumstances.

Survivors Benefits
Social Security



Modern Widows Club



Widows are Younger
Than You Think



Widows @ Work:
Critical Tips for
Managers



Revolutionizing the
Future of Widowhood
Impact Report



7 Critical Money
Management Skills
Every Widow Should
Have



If You Do Nothing
Else, Do These Things
by Mindy Howell



Differences Between
Term & Whole Life
Insurance



For Dollar: Get Relief
from Hospital Bills



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