

Checklist for San Diego Memorial Society Members

Peace of mind and protection! These are important reasons why the San Diego Memorial Society recommends that members keep the following information in a folder, in a safe place and in a place known and available to an executor, personal representative, relative or a close friend. A safe deposit box sometimes requires a death certificate in order to open the box, so anything in the box needed in order to obtain a death certificate will set up a “catch 22.”

- A copy of the completed Final Planning Booklet (FPB).
- Names, addresses, telephone numbers, fax numbers and email addresses of clergy, lawyer, accountant, next of kin and a person to be named executor of the member’s estate.
- Any bequests arranged for her or his body such as the Willed Body Program at UCSD, Donated Life California, San Diego Medical Society Eye Bank, et cetera.
- Names of people the member wishes to have invited to their memorial service, including contact information for each.
- An indication to next of kin regarding the nature of the memorial service desired.
- A copy of the member’s Last Will and Testament. The original should be kept in a lawyer’s safe or in some other safe location easily accessible to family members.
- Important numbers, such as Social Security Number; credit card and other charge account numbers; bank, credit union and investment account numbers; combination of locks; serial numbers of expensive cameras and other valuable property and the number of any safe deposit box along with the name of the bank and location of the branch where the box is located.
- Annuity contracts, pension plan documents, life insurance policies and a list of merchandise and property upon which installment payments are being made.
- An inventory of securities and property owned by the member.
- Newspaper, magazine, book clubs, et cetera, and a list of organizations to which the member belongs.
- Other important papers such as automobile titles, property and casualty insurance policies, bank books, passport, income tax returns, birth, marriage and divorce certificates.

The Member’s Executor and Next of Kin Should Notify:

- The participating mortuary of your choice. Make an appointment. Request sufficient copies of the death certificate for insurance policies, both the Veterans and Social Security Administrations, other institutions providing benefits, et cetera.
- Willed Body Program of UCSD Hospital, if the body of the deceased was donated: Call 858-534-4536 (24-hour answering machine) for immediate attention to donated organs.
- Clergy, lawyer, accountant and executor or administrator of the estate.
- All life insurance companies should be called to request claim forms.
- Deceased’s employer and union, if employed or if death benefits are due, and the local Social Security and Veterans Administration offices, if eligible for benefits from either.
- Book clubs, credit card companies and stores or other businesses holding open accounts.
- Lodges, fraternities, sororities, schools or other organizations which the deceased member may have belonged or attended and maintained an alumni or emeritus relationship.
- Local United States Post Office branch with the forwarding address for the estate.