

VFW MEMBER \_\_\_\_\_

DATE SUBMITTED \_\_\_\_\_

**EMERGENCY CONTACTS**      **(List everyone to be notified with phone numbers)**

**THAILAND**

NAME	RELATIONSHIP	PHONE	COMMENTS
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**USA OR OTHER**

NAME	RELATIONSHIP	PHONE	COMMENTS
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**FINANCIAL ACCOUNTS USA** (List all account numbers/PINs and contact data)

NAME COMPANY	ACCT NUMBER (PIN)	PHONE	BENEFICIARY/COMMENTS

**DO ANY OF YOUR ACCOUNTS HAVE AD&D INSURANCE POLICY** (Small policies often free with some accounts)

COMPANY	POLICY INFO	PHONE	BENEFICIARY/COMMENTS

**FINANCIAL ACCOUNTS THAILAND** (List all accounts with numbers/PINs)

COMPANY	ACCOUNT NUMBER (PIN)	ACCT TYPE (Joint Y/N)	PHONE	BENEFICIARY
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**CREDIT/DEBIT/ATM CARDS** (Indicate any paid by direct debit)

COMPANY	ACCOUNT NUMBER (PIN)	D/D (Y/N)	CONTACT PHONE
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**LIFE AND OTHER INSURANCE POLICIES INCLUDING AUTO INSURANCE**

COMPANY	POLICY NUMBER	PHONE	BENEFICIARY
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**TAX PREPARER** If you have been using a tax preparer provide his/her contact information. Yes, the IRS wants a final tax return. This is usually done by your executor but a tax preparer will already have much background information.

NAME	ADDRESS	PHONE
_____	_____	_____

**WILLS/LIVING WILLS** (Where can copies be found. One should be at VFW)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**LOCAL ACCOUNTS PAID BY DIRECT DEBIT** (Unless from a Joint account your survivors will have to update this)

COMPANY

ACCOUNT NUMBER

PHONE

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**SBP/RC-SBP** (Beneficiary. See SBP on WEB if divorced/remarried.)

NAME

ADDRESS

PHONE

_____	_____	_____
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**EXECUTOR AND ALTERNATE FOR USA WILL**

NAME ADDRESS PHONE

_____	_____	_____
_____	_____	_____

**EXECUTOR AND ALTERNATE FOR THAILAND WILL**

NAME PHONE

_____	_____
_____	_____

**MISCELLANEOUS (Any other possibly useful information)**

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PLACE THIS DOCUMENT IN YOUR PERSONAL FOLDER AT THE VFW, ALONG WITH COPIES OF YOUR DD 214, WILLS, MARRIAGE CERTIFICATES, DIVORCE DECREES AND ANY OTHER PERTINENT DOCUMENTS IN A SEALED FOLDER MARKED 'TO BE OPENED IN THE EVENT OF MY DEATH'.

I RECOMMEND INCLUDING ANY PIN/ACCESS NUMBERS/PASSWORDS IF YOUR SPOUSE DOES NOT ALREADY HAVE THEM, THEY WILL BE NEEDED FOR THEM TO OBTAIN CASH BEFORE THE ACCOUNTS ARE CLOSED AND FOR OTHER INFORMATION. YOUR SPOUSE SHOULD ALSO HAVE AT LEAST ONE ACCOUNT IN HIS/HER NAME TO GUARANTEE THEM ACCESS TO ASSETS UNTIL THE ESTATE IS SETTLED/ACCOUNTS ARE NO LONGER FROZEN.

BE SURE TO UPDATE ANY ACCOUNTS WITH THE CURRENT BENEFICIARIES. ESPECIALLY IMPORTANT IF THERE HAS BEEN A DIVORCE. I HAD A BROTHER IN LAW WHO FAILED TO DO THIS AND HIS EX WIFE GOT ALL THE BENEFITS AND HIS NEW WIFE GOT NOTHING. MORE UNFORTUNATE IS THAT ALTHOUGH HE WAS ILL, HE WAS AMBULATORY AND COULD EASILY HAVE DONE THIS.

IF YOU ARE CONCERNED THAT A SPOUSE/SIGNIFICANT COULD CLEAN OUT YOUR ACCOUNTS BUT YOU WANT TO PROVIDE FOR THEM AFTER YOUR DEATH THE INFORMATION YOU PROVIDE HERE CAN DO THIS WITHOUT THEIR NEED TO KNOW AT THIS TIME.

REMEMBER TO UPDATE THIS DOCUMENT IF THERE ARE CHANGES IN THE FUTURE.