



**THE CYA ORGANIZER OF**

---

**QUICK EMERGENCY INFORMATION**

1. Location of Legal Documents (i.e. Wills, Trusts, Powers of Attorney): \_\_\_\_\_  
\_\_\_\_\_
2. My CYA Organizer location: \_\_\_\_\_
3. Alarm Code/Passcode: \_\_\_\_\_
4. Smart Phone Password: \_\_\_\_\_
5. Computers Passwords: \_\_\_\_\_
6. Home lock codes: \_\_\_\_\_
7. Garage door code: \_\_\_\_\_
8. Gate lock combinations: \_\_\_\_\_
9. Other: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

1. Information needed for my death certificate:
  - (a) Length of time I resided in Texas: \_\_\_\_\_
  - (b) My full name, preferably as shown on my birth certificate:  
\_\_\_\_\_
  - (c) My date of birth: \_\_\_\_\_
  - (d) My occupation: \_\_\_\_\_
  - (e) My birthplace: \_\_\_\_\_
  - (f) My citizenship: \_\_\_\_\_
  - (g) My father's name: \_\_\_\_\_
  - (h) My mother's maiden name: \_\_\_\_\_
  - (i) My dates of military service (if applicable); \_\_\_\_\_

(The remaining information needed for the death certificate cannot be obtained until the date of death)

2. Any specific instructions pertaining to my burial (such as giving my body to science, cremation, full military honors, etc.)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. If a mortuary has been selected, give the address and the telephone number:  
\_\_\_\_\_

4. Any pre-arrangements for burial services (if applicable):  
\_\_\_\_\_

5. Is there any burial insurance? If so, with what company and where is the policy? \_\_\_\_\_

6. Is there a cemetery plot? If so, give the name of it, where it is located, and in whose name: \_\_\_\_\_

7. If applicable, the deed to my cemetery plot is located: \_\_\_\_\_

8. If applicable and if possible, please perform the following type of service at the following religious institution: \_\_\_\_\_  
\_\_\_\_\_

9. With regards to my obituary, the names of my immediate family, the organizations, business and professional positions I have held, the colleges I attended, degrees received, achievements, fraternal organization memberships are as follows:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

10. Name, address and telephone number of the executor of my estate:  
\_\_\_\_\_

11. About my Will and/or Trust:

(a) My original Will and/or Trust is located:  
\_\_\_\_\_

(b) The date of execution of my original Will and/or Trust was:  
\_\_\_\_\_

(c) A copy (ies) of my Will and/or Trust is/are located:  
\_\_\_\_\_

(d) My spouse does \_\_\_\_\_/ does not \_\_\_\_\_ have a Will and/or Trust.

(e) If applicable, my spouse's Will and/or Trust is dated:  
\_\_\_\_\_

(f) If applicable, my spouse's Will and/or Trust is located:  
\_\_\_\_\_

(g) If applicable, copies of my spouse's Will and/or Trust are located:  
\_\_\_\_\_

12. My insurance policy information (if applicable):

(a) Life insurance agent's name and telephone number: \_\_\_\_\_

(b) My life insurance policy is located: \_\_\_\_\_

(c) My life insurance policy company, number, coverage amount and beneficiaries are:

\_\_\_\_\_  
\_\_\_\_\_

(d) If applicable, my spouse has \_\_\_\_ does not have \_\_\_\_ life insurance.

(e) If applicable, my minor child has \_\_\_\_, does not have \_\_ life insurance.

(f) If applicable, my other insurance policy information is as follows:

\_\_\_\_\_

13. If applicable, the extra key to my safe deposit box is located: \_\_\_\_\_

14. Important names and telephone numbers:

(a) Estate Planning Law Firm: Burch Law, 7920 Belt Line Rd., Ste. 700, Dallas, Texas 75254, 972-385-0558, cya@burch-law.com, www.burch-law.com.

(b) Trustee: \_\_\_\_\_

(c) Accountant: \_\_\_\_\_

(d) Financial Planner: \_\_\_\_\_

(e) Guardian for minors, if applicable: \_\_\_\_\_

15. Other personal data:

(a) My social security number: \_\_\_\_ - \_\_\_\_ - \_\_\_\_

(b) My date of marriage \_\_\_\_\_ / date of divorce \_\_\_\_\_

(c) Location of my marriage certificate and/or divorce documentation:

\_\_\_\_\_

(d) Location of my family's birth certificates: \_\_\_\_\_

(e) Location of my passport, naturalization papers, educational records, Employment records, military papers, etc. \_\_\_\_\_

16. Other important financial information:

(a) Sponsors of, and pertinent information about, any of my retirement, profit-sharing or pension plans:

\_\_\_\_\_

(b) Market value, location of title and mortgagee's name with regards to any real property I own or in which I have an interest:

\_\_\_\_\_

\_\_\_\_\_

(c) Names, addresses of my banks and my account numbers at such banks:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

17. The names, addresses and telephone numbers of the people whom I wish to be notified of my death are as follows:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

18. List of email and web accounts and memberships with passwords:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

---

---

---

---

---

---

---

---

---

---

19. List of all real estate/property you own and list ownership percentages (include timeshares, oil, gas, and mineral interests, include property inside and outside of Texas):

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

20. List of any business interests, such as LLCs:

---

---

---

---

---

---

---

---

---

---

21. List whom you'd like to take care of any pets you may have at your death and include at special instructions:

---



---



---



---



---



---



---



---

22. List of important paperwork and their location:

ITEM	LOCATION
Birth Certificate	
Marriage Certificate	
Pre or Post-Nuptial Agreement	
Divorce Decree	
Separation Agreement	
List of heirs and other relatives	
Military service records	
Social Security card	
Medical records	
Will and/or Trust (original and copy)	
Spouse's Will and/or Trust	
Tax records	
Life insurance policies	
General insurance policies	
Stocks & Bonds	
Notes receivable	
Mortgages	
Deeds	

Leases	
Estate inventory	
Bank records	
Trust instruments	
Business agreements	
Cemetery deeds	
Financial records	
Employee Benefit Plan records	
Other	
Other	

23. List all utility companies or other important household contacts (i.e. cell phone, electricity, gas, internet, cable/streaming memberships, etc. Provide any login information above in question in 18):

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---











---

---

---

---

---

---