

## **Elfun Planning Checklist: Planning for Your Survivors 5/22/2003**

Organize the following information in a place known or easily accessible to your survivors in the event of your death - some of the information may require annual updates on your part.

### **Information You'll Need:**

1. Your Social Security number.
2. A copy of your GE Beneficiary Designation form. You should update your form if your address changes, your beneficiary or beneficiaries' addresses change, or whenever you want to change your beneficiary designations.
3. Your estate information: your executor's name, address and phone number. The name, address and phone number of your lawyer, accountant or financial advisor, if applicable.
4. Your most recent GE Personal Share Statement, if you are an active employee. If you are retired, the statement of insurance that you received at the time of your retirement. Retirees may receive an updated insurance statement by calling the GE Pension Benefits Inquiry Center at **1-800-432-3450**.
5. A list of your health and life insurance coverages outside of your GE coverages, with contact phone numbers.
6. A list of your income sources, including salary, pension (GE and others), Social Security, annuities, funds, trusts, stock dividends, interest, etc.
7. A list of your bank, retirement, stock, mutual fund and other accounts, including the name of the company or institution, safety deposit box location(s), account numbers and phone numbers.
8. A list of properties owned by you, such as your home, your business or other property.
9. A list of your outstanding loans, debts or credit card accounts, including the name of the company or institution, and account numbers.
10. Directions on where key documents are located. List storage locations for wills, power of attorney, health care proxies, deeds, mortgage statements, tax returns, bank statements, pass books, loan contracts, investment documents, insurance policies, car and boat registration(s) and title(s), credit card contracts, safe deposit box key, personal safe combination, etc.
11. Other important information such as your status as a veteran and related discharge papers (Federal Form DD214), if applicable; this may include your birth certificate, naturalization papers, your marriage certificate, and any preferences regarding your funeral.