



Find My Important Papers and Posthumous Checklist

This document is designed to be a helpful starting point for our members as they navigate retirement and beyond, but it is not comprehensive. If needed, consult a professional for more guidance in estate and financial planning. A copy of this list should be given to the person who would handle your legal and financial matters should you become incapacitated. You should review and update this information periodically.

Name	OPERS Member ID	Social Security Number
Spouse/Partner name	OPERS Member ID	Social Security Number

My valuable papers are stored in these locations (address plus where to look)

A. Residence _____

B. Safe Deposit Box _____

C. Other _____

DOCUMENT	LOCATION	DOCUMENT	LOCATION
My will (original)	_____	List of important friends/neighbors	_____
Spouse's will (original)	_____	Employment contracts	_____
Power of attorney	_____	Partnership agreements	_____
Advance health directive/living will	_____	Titles and deeds	_____
Health care proxy	_____	Notes (mortgages)	_____
Trust agreements	_____	List of stored & loaned items	_____
Funeral arrangements	_____	Auto ownership records	_____
Life insurance policy(s)	_____	Birth certificate	_____
Health insurance policy(s)	_____	Spouse's birth certificate	_____
Long-term care insurance policy(s)	_____	Marriage certificate	_____
Homeowner/rental policy(s)	_____	Divorce/separation records	_____
Car insurance policy	_____	Children's birth certificates	_____
List of checking & savings accounts	_____	Military/veteran's papers	_____
List of credit cards	_____	Safe combination	_____
Brokerage account records	_____	Safe deposit box key	_____
OPERS retirement papers	_____	Passwords (computer, cell phones)	_____
SoonerSave, IRA, 401k papers	_____	Other: _____	_____
Copies of beneficiary forms	_____	Other: _____	_____

Important Names, Addresses and Phone Numbers

Doctor(s): _____

Clergy: _____

Attorney: _____

Accountant: _____

Other contacts: _____

Date Prepared: _____ Copies given to: _____



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Losing a loved one is never easy and handling financial and administrative matters during this time can feel overwhelming. To help ease the process, we've created a checklist outlining the key steps to take regarding OPERS benefits and other important considerations.

Note: Family or beneficiaries of a member who has passed should contact OPERS. OPERS will then review the member's record for their instructions on beneficiary and/or survivor benefits. See opers.ok.gov/death-benefits for more information.

Immediate Steps:

- ☐ Notify friends, family, and workplace (if applicable)
- ☐ Look for and review posthumous directions or last will and testament
- ☐ Making funeral and burial arrangements
- ☐ Secure the home and belongings

Financial, Personal, and Legal Matters:

- ☐ Request multiple certified copies of the death certificate from the funeral home or vital records office
- ☐ Notify key institutions:
 - ☐ OPERS, (405) 858-6737
 - ☐ Social Security Administration, (800) 772-1213
 - ☐ Banks or financial institutions
 - ☐ Life insurance provider
 - ☐ Prevent identity theft by notifying:
 - ☐ Experian, (479) 343-6239, experian.com
 - ☐ Equifax, (888) 378-4329, equifax.com
 - ☐ TransUnion, (800) 916-8800, transunion.com
- ☐ Forward mail to appropriate recipient
- ☐ Secure or close social media, email, other subscription accounts
- ☐ Locate important documents (birth certificate, marriage certificate, divorce decree, etc.)
- ☐ Contact the executor of any will, or contact an attorney to begin probate proceedings
- ☐ Identify outstanding debts (mortgage, utilities, credit cards)
- ☐ Cancel unused services (phone, internet, streaming services, etc.)