PERSONALIZED CLOSING MAP

A clearer place to begin.

Prepared for Evelyn Carter
Entirely invented situation - illustrative beta preview

The information Evelyn supplied

Evelyn is organizing records after her fictional spouse David's death. She has identified an employer, a bank, an insurer, and several household providers. Their names and document details are not supplied in this preview.

This map brings her records, contacts, and open questions into one place. It does not decide which actions she is authorized or required to take.

Start with the three organizing priorities on the next page.

START HERE

Your three organizing priorities.

Chosen for this fictional organizer; not a ranking of legal urgency.

01 ## Gather what you already have

List the available papers and their locations. Keep missing records marked as unknown.

02 ## Build your contact list

Keep the employer, bank, insurer, and household-provider contacts together.

03 ## Write down the questions

Use the prompts on page 4. Ask each institution or adviser about the process and documents it requires.

YOUR WORKING PICTURE

Records, contacts, and open questions.

A partial inventory is a useful starting point.

Employer and benefits

Employer reported; contact not supplied. Question: who handles inquiries after a death?

Official resource: USA.gov

Banking and household bills

Bank and regular providers reported; records not listed. Question: where are the latest statements and provider contacts?

Official resource: FDIC BankFind

Insurance

An insurer was reported; policy details are not supplied. Question: who can explain its inquiry and document-submission process?

Official resource: NAIC

Professional questions

Keep authority, ownership, probate, debt, and tax questions for the relevant institution or qualified professional.

Official resource: Oregon State Bar

CONVERSATION PROMPTS

A useful question is a place to start.

Adapt these general prompts to the institution you are contacting.

Employer

“Who is the right contact for questions after a death? Can you send your information and documentation requirements in writing?”

Bank or insurer

“Which department handles these inquiries? What information can you explain, and how should any requested documents be submitted?”

When something is unclear

“I do not know that yet. Where would I look for the information, or who is the appropriate person to ask?”

Before sending sensitive information

“How can I verify this contact and your document-submission channel?”

KEEP IT TOGETHER

Your working page.

One place for the answers you receive and the information still missing.

Contact / organization

Question I want to ask

Answer or record received

What is still unknown

Service boundaries

The Closing Map organizes supplied information. It does not provide legal, tax, financial, investment, medical, or fiduciary advice; determine authority or deadlines; select legal forms; access accounts; or administer an estate. This sample creates no attorney-client relationship.

Do not include passwords, identification numbers, or full account numbers in an organizer shared for review. Public resource links are starting points, not personal account searches.