

## BUSINESS/FINANCES

### Listing of Important Documents and Directives

#### Will/Living Trust

- Location of documents
- Executor, personal representative or trustee including contact information
- Attorney who prepared the will/living trust including contact information

#### Durable Power of Attorney

- Location of documents
- Person who has power of attorney and contact info.

#### Medical Directives

- Location of documents
- Person(s) who has been designated to make medical decisions including contact information

#### Birth Certificate

- Location of document
- Date of Birth

#### Passport

- Location of document

#### Social Security Number

- Benefits currently receiving

#### Marriage License

- Location of document

#### Health Records

- Doctor and hospital information including contact info.

#### Real Property

- Location of documents
- Addresses of property
- Name of mortgage companies
- Account numbers including contact information

#### Personal Property

- Location of vehicle titles or other papers
- Bank or institution holding financing
- Account numbers including contact information

#### Tax Returns

- Location of documents
- Accountant who prepares tax returns and contact info.

#### Safe Deposit Box

- Location of box
- Box number
- Person(s) who have access including contact info.
- Location of key(s)

#### Other Records:

- Military
- Divorce papers
- Guardian or custodian papers
- Children's records
- Business agreements
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- \_\_\_\_\_
- \_\_\_\_\_

#### Insurance Policies

- Health insurance & prescription drug policies (including Medicare/Medicaid)**
  - Policy document locations
  - Account numbers
  - Provider names including contact info.
- Long term care policies**
  - Policy document locations
  - Account numbers
  - Provider name including contact information

#### Life, AD&D, disability and other insurance policies

- Policy document locations
- Account numbers
- Provider name including contact information

#### Homeowner, rental and vehicle policies

- Policy document locations
- Account numbers
- Provider name including contact information

#### Financial & Investments

##### Loans and credit cards

- Bank or card provider name and contact info.
- Loan or account number

##### Checking account

- Bank including contact information
- Account number
- Person(s) who have access and contact info.

##### Savings account and CD's

- Bank including contact information
- Account number
- Person(s) who have access and contact info.

##### Other bank accounts

- Bank including contact information
- Account number
- Person(s) who have access and contact info.

##### Stocks/bonds/mutual funds

- Names of financial institutions
- Account numbers
- Document location

##### Annuities

- Name of provider
- Document location
- Account number

##### Other investments

- Location and contact information
- Document location
- Account numbers

##### Retirement plans, pensions, profit sharing

- Name of company and contact information
- Document location
- Account number

##### Assets

- Contact information
- Account number
- Document location

#### Death Directives

##### Funeral arrangements

- Name of facility and contact information
- Prepaid items
- Specific directives

##### Burial arrangements

- Name of burial site
- Contact information
- Specific directives
- Prepaid items

#### Other

- Other Documents
- Other Directives