



RECORDS AND INFORMATION LIST
FOR

For Assistance or Consult	
Physician	
Attorney	
Accountant	
Insurance Agent	
Financial Advisor	
Emergency Contact	
Legal Documents (location of originals and/or copies)	
Will	
Trust	
Advanced Medical Directive	
Power of Attorney	
Burial Contracts or Instructions (including cemetery deeds)	
Housing	
Deed	
Mortgage	

Taxes and Assessments	
Homeowners Insurance	
State and Federal	
Tax Returns and Receipts	
Property	
Income	
Social Security and/or Pension	
State and Federal	
Insurance Policies	
Health	
Life	
Hospitalization	
Long-Term Care	
Disability or Medi-Gap	
Property	
Automobile	
Burial/Funeral	
Medicaid	

Medicare		
VA Benefits		
Health		
Medicare Card		
Private Insurance Card		
Medicare Supplement Card		
Pharmacy Card		
Medicaid Card		
Physicians' letters and bills		
Medical Records		
Medication list		
Hospital Bills		
Equipment rental contracts		
Personal		
Birth Certificate		
Social Security No.		Location of card:
Passport		
Marriage Certificate		

Divorce Decree		
Title and Registration for Vehicles		
Military papers		
Guardians for any minor children		
Adoption papers		
If serving as fiduciary for any person or trust (list of names and contact info)		
Hospice/in-home/facility preferences	Hospice:	
	In-Home:	
	Facility:	
Pet and pet care		
Organ donation preference		
Money and Property		
Checking Accounts	Bank:	Account #
	Bank:	Account #
	Bank:	Account #
Savings Accounts	Bank:	Account #
	Bank:	Account #
	Bank:	Account #

Brokerage Accounts	Institution:		Account #
	Institution:		Account #
	Institution:		Account #
401(k)/IRAs	Bank:		Account #
	Bank:		Account #
	Bank:		Account #
Checkbook and Register			
Unused Blank Checks			
Uncashed Checks			
Deeds			
Broker and Bank Account Statements			
Safety Deposit Box	Location:	Key:	#
Storage Unit	Location:	Key:	#
Location of in-home storage places and combination if any			
Securities (other than those in accounts listed above)			

Credit and Debit Cards			
Passwords	House Alarm Code		
	Computer/Tablet		
	Cell Phone		
	Email Account(s)	Personal:	
		Business	
	Voicemail		
	Online Banking Account(s)		
	Online Brokerage Account(s)		
Social Media Account(s)			
Service Providers	Utilities (including electric, gas, water, and trash collection)		
	Internet/Cable		

	House Phone		
	Cell Phone		
	Lawn Maintenance		
	Subscriptions	Magazines	•
		Online	•
		Other	•
	Debts	Mortgage	
Loan			
LOC			
<i>Final Disposition and Funeral/Memorial Instructions and Wishes</i>			