**IMPORTANT MAIN PASSWORDS: *(List name of computer/phone & passwords)***

Password(s) for my computer(s)

 Password(s) for my phones(s)

 Password for on-line master password “Vault” (such as “1 Password”) if you have one.

 Otherwise, all passwords can be listed in a separate “On-Line” password document.

 Apple password

 Google password

 Email account name, vendor & password

**IMPORTANT DOCUMENTS TO MAKE**

 Trust and/or Will

 Durable Power of Attorney (this is your “legal” attorney to handle most items)

 Medical Power of Attorney (this is the person you designate to make medical

 decisions on your behalf should you not be able (due to coma, stroke, etc)

 Advanced Health Care Directive (all hospitals require you to have this)

 DNR (Do Not Resuscitate) form (all hospitals require you to have this)

**IMPORTANT DOCUMENT LOCATIONS: *(List name of file & location)***

***(Recommendation…it is a good idea to make electronic copies of all these documents by scanning them and keeping them on your computer…make copies front/back of all credit cards, insurance cards & driver’s license and scan those in).***

 Social Security card

 Driver’s License

 Birth Certificate

 Marriage License/Divorce papers

 Insurance Cards (Medicare, health, auto…other)

 Credit Cards

 Bank & Investment documents

 Trust and/or Will

 Family documents (Trust/Will/Birth/Death/Military Service etc)

 House/Property Title documents and/or Mortgage papers

 Insurance Policies (Life, Auto etc)

 Automobile Pink Slip or Sales/Loan documents

 Automobile Registration

 Other

**IMPORTANT CONTACTS: *(List name, address, phone number & email address)***

 Attorney(s) – Estate, Regular

 Power of Attorney/Medical Power of Attorney

 Funeral/Cremation arrangements

 Special Banker Contact

 Special Investment Contact

 Primary Family/Friend Contact

 Mail Box/PO Box (if mail is not received at home)

**FINANCIAL / BANKING: *(List Bank name, account number and file name/location for each. Also list whether you have “on-line” accounts for each – with their passwords)***

 Checking

 Savings

\_\_\_ Investments

 Safe Deposit Box

 Credit Cards *(Take front & back picture of each card & put in file)*

 Other

**FINANCIAL / INVESTMENTS: *(List Bank/Vendor name, account number and file name/location for each. Also list whether you have “on-line” accounts for each – with their passwords)***

 CD’s

 IRA’s

 Stocks

 Bonds

 Mutual Funds

 Annuities

 Commodities

 Cryptocurrencies

 Gold/Silver

 Other

**PROPERTY: *(List name of file & location)***

 Home(s)

 Land

**AUTOMOBILE(S): (*List name of file & location)***

 Automobiles

 Boats

 Other

**PERSONAL PROPERTY: *(List name of file & include pictures of valuables)***

 Furniture

 Jewelry

 Art

 Collectables

 Other

**INSURANCE POLICIES: (*List name of file & location)***

 Life Insurance

 House

 Auto

 Earthquake

 Health Insurance

 Other

**ON-LINE COMPANIES/MEMBERSHIPS THAT HAVE ACCOUNTS & PASSWORDS:**

**Here are examples: *(List name - plus User ID & Password)***

Social Security

Medicare

DMV

 Banks

 Investment companies

 So Cal Gas Co

 So Cal Edison Co

 Cable TV

 Cell Phone company

 Life Insurance Companies

 Health Insurance Companies

 Dental Insurance Companies

 Auto Insurance Companies

 Other Insurance Companies

 Doctor/Medical/Hospital “Patient Portals” (such as UCLA, Cedars, St. Johns)

 Pharmacy(s)

 AAA

 AARP

 Amazon

 Pay Pal

 Ebay

 Facebook

 Netflix

 Other: