

Checklist of “Life” Information Needed For My Executor/Trustee

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)

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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

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- 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: