Personal INformation

Checklist

# Identifying Information

Social Security Card

Birth Certificate

Wedding Certificate

Passport

Driver’s License

Titles for Property and Vehicles

# Medical Information

Insurance Information

Allergies/Drug Interactions

Medical History

Current Medications

Living Will

# Financial INformation

Overview of Financial Accounts Held with Account Numbers

Bank Beneficiary Forms

Investment Account Information

# End of Life Planning INformation

Life Insurance Policy Information

Contact Information for All Beneficiaries

Contact Information for Family

Will

Asset List

Business Information