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