

# PERSONAL INFORMATION CHECKLIST

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## 1. IDENTIFYING INFORMATION

- Social Security Card
- Birth Certificate
- Wedding Certificate
- Passport
- Driver's License
- Titles for Property and Vehicles

## 2. MEDICAL INFORMATION

- Insurance Information
- Allergies/Drug Interactions
- Medical History
- Current Medications
- Living Will

## 3. FINANCIAL INFORMATION

- Overview of Financial Accounts Held with Account Numbers
- Bank Beneficiary Forms
- Investment Account Information

## 4. END OF LIFE PLANNING INFORMATION

- Life Insurance Policy Information
- Contact Information for All Beneficiaries
- Contact Information for Family
- Will
- Asset List
- Business Information