

Document / Information Check List

For Him:

For Her:

State Specific Will (updated < 5 years)

State Specific Will (updated < 5 years)

Medical Power of Attorney

Medical Power of Attorney

Limited Power of Attorney

Limited Power of Attorney

Advanced Directives

Advanced Directives

Her name on Investments

His name on Investments

Her name on bank accounts

His name on bank accounts

Her name on life insurance

His name on life insurance

She is authorized on Soc. Sec. Account

He is authorized on Soc. Sec. Account

She is Authorised on Pension Account

He is Authorised on Pension Account

She is authorized on credit card act(s).

He is authorized on credit card act(s).

She is authorized on all Joint accounts

He is authorized on all Joint accounts

She has access to this information

He has access to this information

Important Document Inforamtion

Document		Location	
Company	Contact	Phone	email
How to Access			

Document		Location	
Company	Contact	Phone	email
How to Access			

Document		Location	
Company	Contact	Phone	email
How to Access			

Document		Location	
Company	Contact	Phone	email
How to Access			

Document		Location	
Company	Contact	Phone	email
How to Access			

Document		Location	
Company	Contact	Phone	email
How to Access			

Document		Location	
Company	Contact	Phone	email
How to Access			

Account Passwords

Website	Account #	User Name	Password
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Notes / Security Info

Website	Account #	User Name	Password
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Notes / Security Info

Account Passwords Continued

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