# **Legacy File Information**

### **Primary Contact Information:**

Company	Contact	Phone	Email
Lawyer			
Accountant			
Investments			
Health Insurance			
Life Insurance			
Life Insurance			
Life Insurance			
Bank			
Bank			

# **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		
	Г		
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 ife insurance	His name on ife insurance		
Her hame on he mourance	This hame on he hisurance		
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 Phone Company Contact email How to Access Document Location Phone Company Contact email How to Access Document Location Phone Company Contact email How to Access Document Location Phone Company Contact email How to Access Document Location Phone Contact Company email How to Access Document Location Phone email Company Contact How to Access Document Location Company Phone Contact email How to Access

## **Account Passwords**

Website	Account #	User Name	Password	
Notes / Security Info				
Website	Account#	User Name	Password	
Notes / Security Info				
Website	Account#	User Name	Password	
Notes / Security Info				
Website	Account#	User Name	Password	
Notes / Security Info				
Website	Account #	User Name	Password	
Notes / Security Info				
Website	Account#	User Name	Password	
Notes / Security Info				
Website	Account #	User Name	Password	
Notes / Security Info				
Website	Account #	User Name	Password	
Notes / Security Info				
Website	Account #	User Name	Password	
Notes / Security Info				

#### **Account Passwords Continued**

Website	Account #	User Name	Password	
Notes / Security Info				
Website	Account #	User Name	Password	
Notes / Security Info				
Website	Account #	User Name	Password	
Notes / Security Info				
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Website	Account #	User Name	Password	
Notes / Security Info				