**IMPORTANT MAIN PASSWORDS: *(List name of computer/phone & passwords)***

Password(s) for my computer(s)

Password(s) for my phones(s)

Password for on-line master password “Vault” (such as “1 Password”) if you have one.

Otherwise, all passwords can be listed in a separate “On-Line” password document.

Apple password

Google password

Email account name, vendor & password

**IMPORTANT DOCUMENTS TO MAKE**

Trust and/or Will

Durable Power of Attorney (this is your “legal” attorney to handle most items)

Medical Power of Attorney (this is the person you designate to make medical

decisions on your behalf should you not be able (due to coma, stroke, etc)

Advanced Health Care Directive (all hospitals require you to have this)

DNR (Do Not Resuscitate) form (all hospitals require you to have this)

**IMPORTANT DOCUMENT LOCATIONS: *(List name of file & location)***

***(Recommendation…it is a good idea to make electronic copies of all these documents by scanning them and keeping them on your computer…make copies front/back of all credit cards, insurance cards & driver’s license and scan those in).***

Social Security card

Driver’s License

Birth Certificate

Marriage License/Divorce papers

Insurance Cards (Medicare, health, auto…other)

Credit Cards

Bank & Investment documents

Trust and/or Will

Family documents (Trust/Will/Birth/Death/Military Service etc)

House/Property Title documents and/or Mortgage papers

Insurance Policies (Life, Auto etc)

Automobile Pink Slip or Sales/Loan documents

Automobile Registration

Other

**IMPORTANT CONTACTS: *(List name, address, phone number & email address)***

Attorney(s) – Estate, Regular

Power of Attorney/Medical Power of Attorney

Funeral/Cremation arrangements

Special Banker Contact

Special Investment Contact

Primary Family/Friend Contact

Mail Box/PO Box (if mail is not received at home)

**FINANCIAL / BANKING: *(List Bank name, account number and file name/location for each. Also list whether you have “on-line” accounts for each – with their passwords)***

Checking

Savings

\_\_\_ Investments

Safe Deposit Box

Credit Cards *(Take front & back picture of each card & put in file)*

Other

**FINANCIAL / INVESTMENTS: *(List Bank/Vendor name, account number and file name/location for each. Also list whether you have “on-line” accounts for each – with their passwords)***

CD’s

IRA’s

Stocks

Bonds

Mutual Funds

Annuities

Commodities

Cryptocurrencies

Gold/Silver

Other

**PROPERTY: *(List name of file & location)***

Home(s)

Land

**AUTOMOBILE(S): (*List name of file & location)***

Automobiles

Boats

Other

**PERSONAL PROPERTY: *(List name of file & include pictures of valuables)***

Furniture

Jewelry

Art

Collectables

Other

**INSURANCE POLICIES: (*List name of file & location)***

Life Insurance

House

Auto

Earthquake

Health Insurance

Other

**ON-LINE COMPANIES/MEMBERSHIPS THAT HAVE ACCOUNTS & PASSWORDS:**

**Here are examples: *(List name - plus User ID & Password)***

Social Security

Medicare

DMV

Banks

Investment companies

So Cal Gas Co

So Cal Edison Co

Cable TV

Cell Phone company

Life Insurance Companies

Health Insurance Companies

Dental Insurance Companies

Auto Insurance Companies

Other Insurance Companies

Doctor/Medical/Hospital “Patient Portals” (such as UCLA, Cedars, St. Johns)

Pharmacy(s)

AAA

AARP

Amazon

Pay Pal

Ebay

Facebook

Netflix

Other: