

Checklist of Essential Information and Documents

You can use the following list as a table of contents for your own binder or online archive of information:

I. Financial Information

Inventory of Assets and Liabilities

Insurance Policies: Life, Long-Term Care, Auto, and Homeowners

Additional Income Sources: Social Security, Pension Plans, Wages, and Employment Accounts

Retirement Plans

Individual Retirement Accounts (IRAs) and Roth IRAs

After-Death Arrangements: Burial, Cremation, Memorial and Funeral Rites, Organ Donation, Ecoburial, etc.

Outstanding Debts and Regular Ongoing Bills

Tax Documents

II. Legal and Estate Information

The Will

Trust Documents

Durable Power of Attorney (POA) for Finances

Durable Power of Attorney (POA) for Health Care, Advance Directive for Health Care, HIPAA authorization, and POLST

III. Other Information

Military Service Information

Personal Wishes and Gifts

Pets

IV. Original Documents**V. User ID, Passwords, PINs, Codes, etc.***

*** KEEP THIS INFORMATION IN A SEPARATE PLACE**