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# General Information

## Who we are

## Passports

## Social Security Information

## Safe Deposit Box

## Fireproof Safe

## Online Passwords

## Accessing Computers

## Divorce Decrees, Prenuptial Agreement

## Email Addresses

## Employment Information

## Address Book

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# Assets

## Checking Account

## Savings Account

## Retirement Accounts

## Other Types of Investments

## House

## Vacation/Second Home

## Vehicles

## Health Savings Account (HSA)

## Trust Funds

## Other Valuables

## Other Asset Information

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# Income

## Employment information

## Pension income

## Social security income

## Other sources of recurring income

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# Expenses

## Credit Cards

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Financial Institution | Card Number | Name on Card | # Cards | Expiration Date | Telephone  Number |
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## Payments

| Expense type | Payee | Timing | Payment Method |
| --- | --- | --- | --- |
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## Recordkeeping Method

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# Loans

## Mortgage loan(s)

## Car loan(s)

## Student loan(s)

## Home Equity Line of Credit

## Any other personal loans

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# Taxes

## Federal Income Taxes

## State Income Taxes

## Property Taxes

## Other Types of Taxes

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# Insurance

## Homeowner’s

## Auto

## Umbrella/Liability

## Dental

## Medical

## Long Term Care

## Life

## Disability

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**Photos**

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# Health Information

## Physicians/dentists

## Living Wills/Medical Power of Attorney

## Medications

## Preferred pharmacy or pharmacies

## Family health history

## Other relevant health information

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# Home Information

## Internet Service Provider and WiFi

## Satellite TV Provider

## Mailbox Location

## Keys

## Homeowner’s Association (HOA)

## Landscaping/Snow Removal Maintenance

## Storage Unit(s)

## Major Improvements

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# Family Information

## Parents

## Siblings

## Children

## Grandchildren

## Other family history

## Family Heirlooms

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# Pets

## Names of pets

## Birthdates

## Vaccinations

## Preferred veterinarian

## Preferred boarder/groomer or pet daycare

## Health issues – past and present

## Where original documents are stored

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# Final Instructions

## Wills

## Organ Donation Instructions

## Cemetery plot

## Church

## Preferred funeral home

## Obituary

## Affiliations

## Notifications to make

## Social Media Instructions

## Any other special instructions

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# Appendix

Safe deposit box contents

Online passwords

Documents on computer

Living Wills/Powers of Attorney

These documents are included, in this order, after this page.