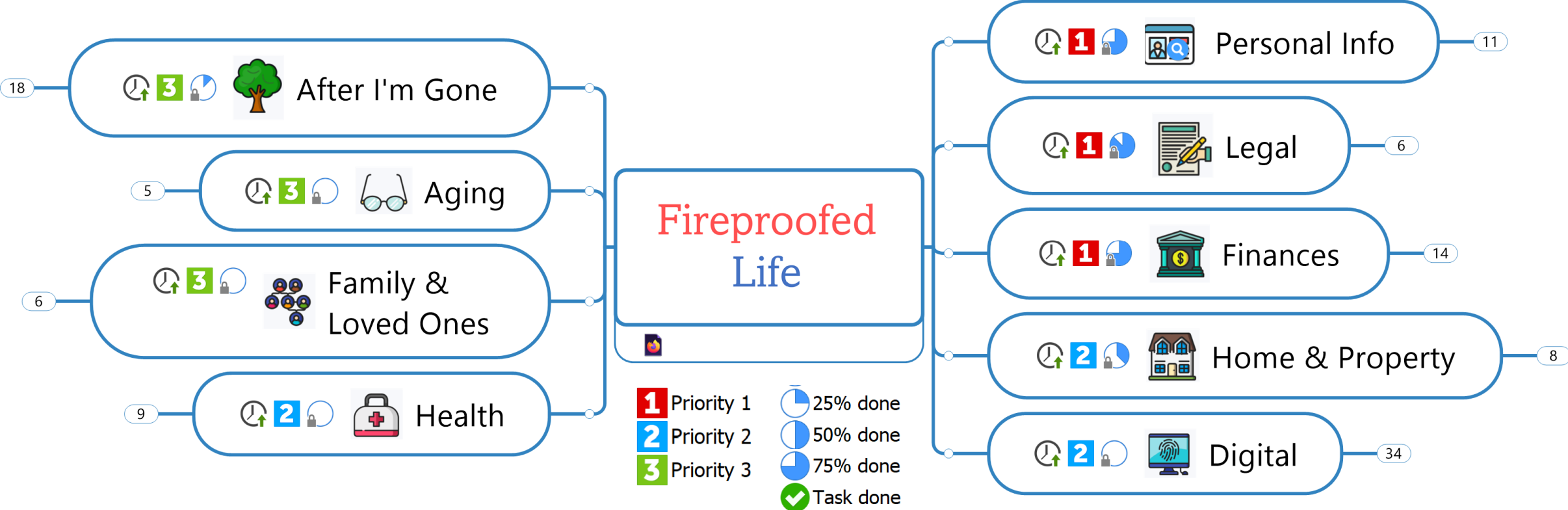
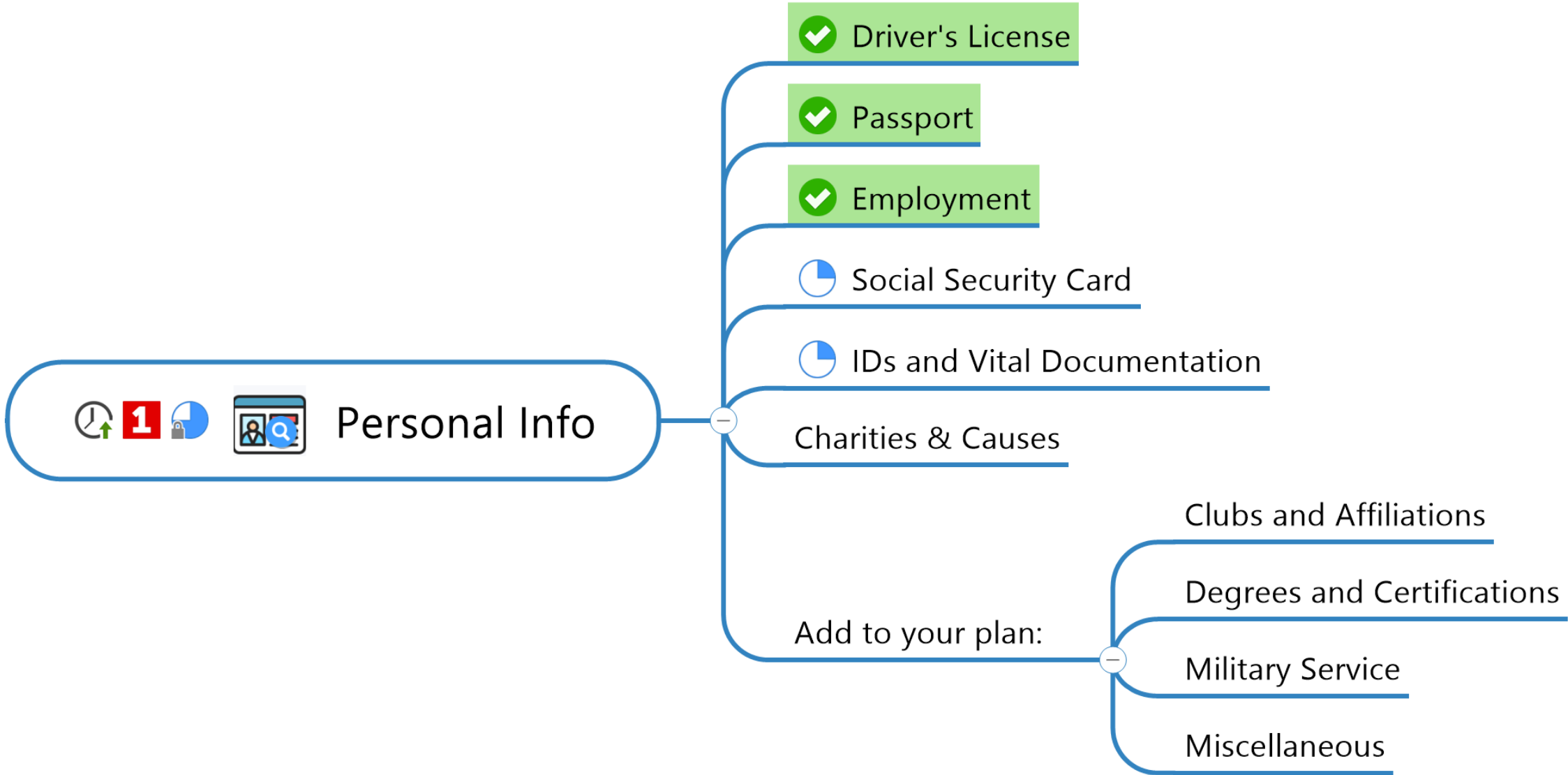


# Plan Development Areas





# Personal Info

✓ Driver's License

✓ Passport

✓ Employment

⌚ Social Security Card

⌚ IDs and Vital Documentation

Charities & Causes

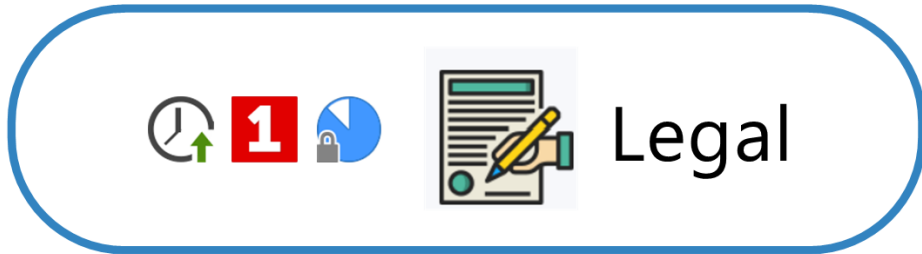
Add to your plan:

Clubs and Affiliations

Degrees and Certifications


Military Service

Miscellaneous




- ✓ Will
- ✓ Trusts
- ✓ Special Needs Guardianship
- Attorneys
- Power of Attorney (Deputies & Delegates)
- Other Legal Documents


    **Finances**

 Banking & Accounts

 Credit Cards

1

 **Advisors and Agents**

 **Life Insurance**

 **Disability Insurance**


 **401K/Pensions**


 Accounts and Assets


 Loans

 Tax Returns

 Other Annuities or Benefits

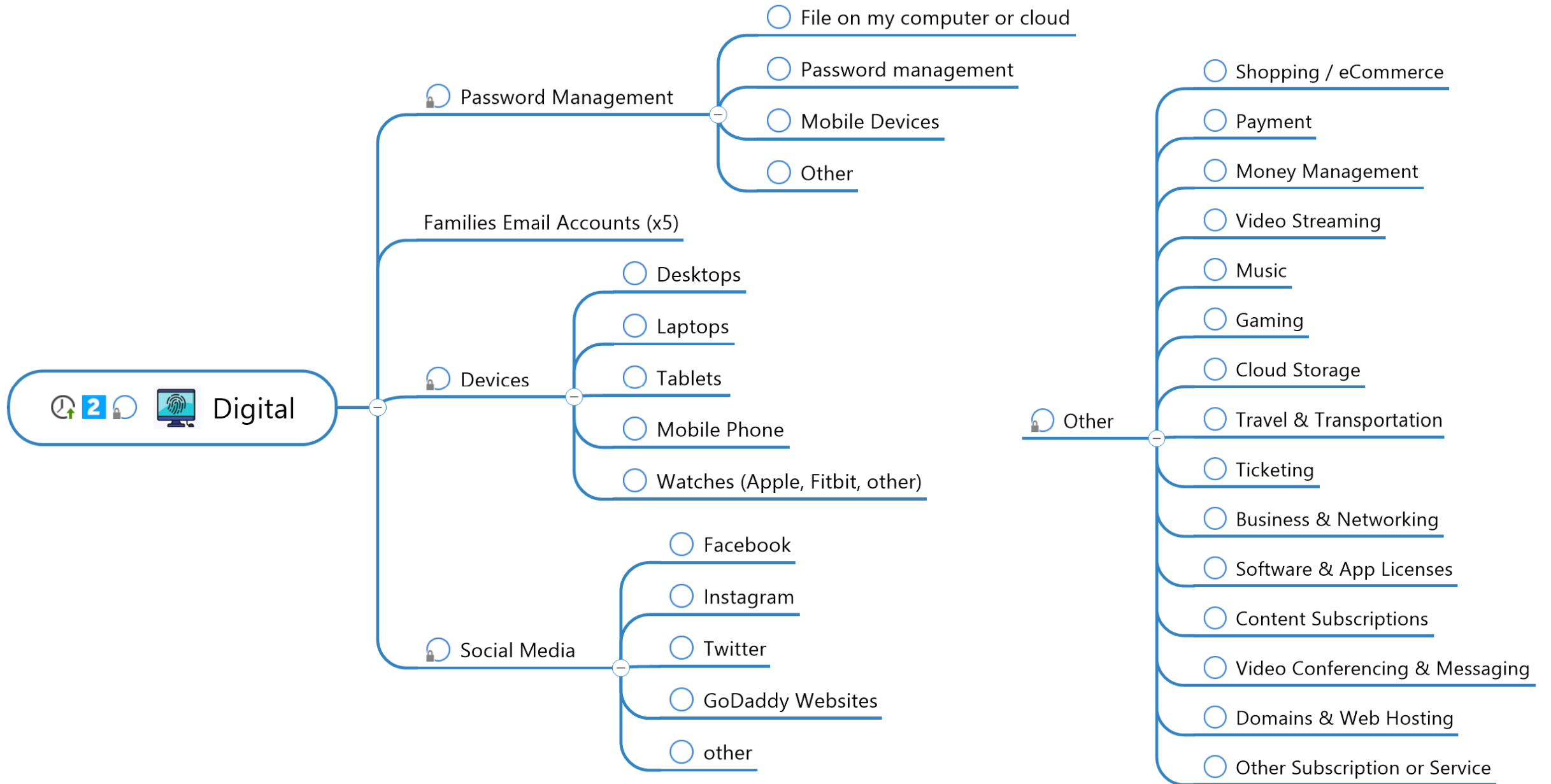
 Social Security

 Military Benefits

 Disability Benefits

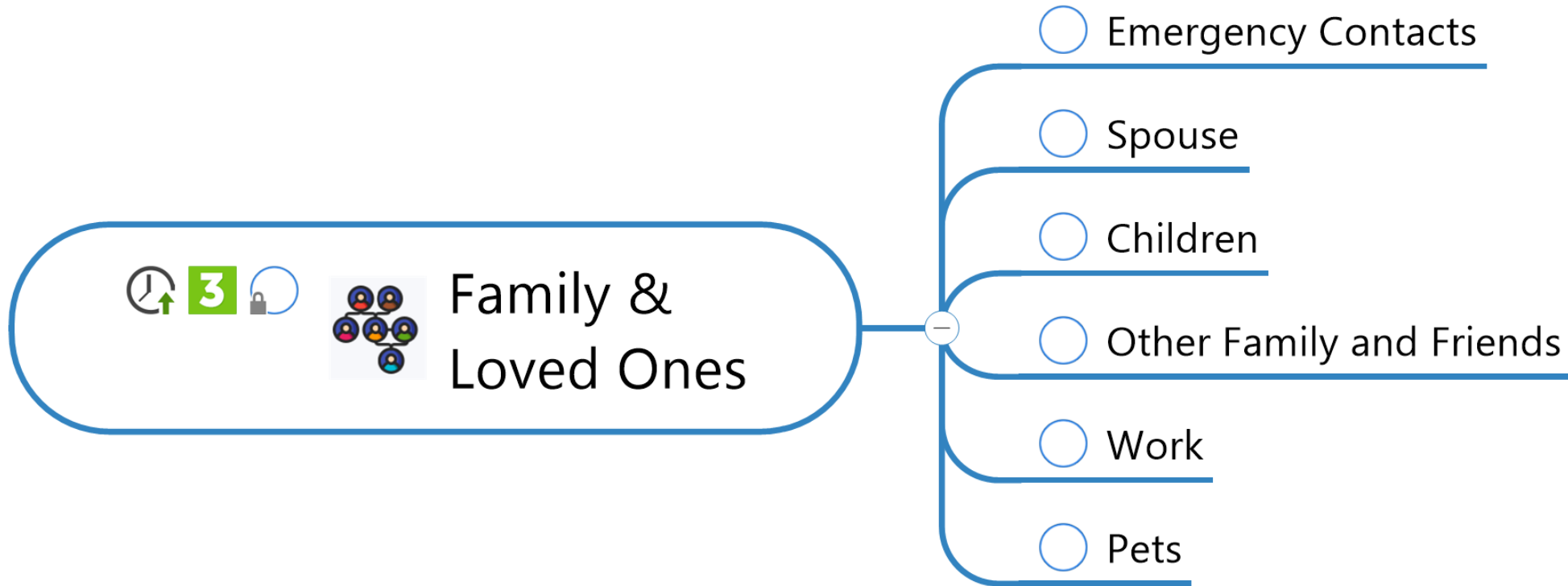
    Home & Property

- Home Safe
- Home
- Cars
- Boat, RVs, etc
- Safe Deposit Boxes
- Other Important Possessions
- Other Real Estate
- Storage Facilities





    Health

- Health Insurance
- Doctors
- Medical Records
- Medications
- Advance Directive
- Allergies
- Medical Conditions
- Medical Equipment & Devices
- Fitness & Wellness





    **Aging**

- Living Preferences when ...
- Care Providers
- Long-Term Care Insurance
- Eldercare Living Preferences
- Eldercare Finances
- Local Helper Team
- Medical Alert Technology

    **After I'm Gone**

- What I Want Done With My Body
  - Cremation
  - Mausoleum
- Funeral Preferences
  - Style 2
  - Church
  - Music
  - Streaming Capability
- Obituary
- Letter to Everyone
- Letters to My Family and Friends
- Memorialization
- About My Life (Ethical Will)
- Genealogy & Family History
- Physical & Antique Photos
- Family Recipes
- Who Gets What