

LIFE READINESS FILE™ EVERYTHING IMPORTANT . . . ALL IN ONE PLACE

Please review the sections below and check the areas you would like included in your customized Life Readiness File™. Each file is tailored to your specific needs.

1. Estate Planning

- Trust - Certification of Trust
- Will
- Power of Attorney
- Advance Healthcare Directive

2. Identity & Government Records

- Birth Certificate
- Passport
- Driver's License / ID - DMV
- Social Security
- Veteran ID (if applicable)

3. Real Estate

- Mortgage / Reverse Mortgage
- Property Taxes
- Home Insurance
- HOA Documents
- Grant Deed
- Improvements & Capital Gains

4. Home Systems & Maintenance

- HVAC
- Electrical
- Plumbing
- Roof
- Water Heater
- Water Softener / Filtration
- Windows / Doors
- Solar / Security System

5. Utility Providers

- Electric
- Natural Gas
- Water / Sewer
- Trash Service
- Internet / Wi-Fi
- Cable / Streaming
- Telephone / Mobile

6. Vehicles & Insurance

- Car Loan
- Vehicle Insurance
- DMV / Registration / Vehicle Titles

7. Financial Accounts

- Bank Account Statements
- Investment Accounts
- Annuities / Pensions
- Beneficiary Designations

8. Taxes

- Last 2 Years Tax Returns
- CPA/Tax Accountant Contact Info

9. Medical & Insurance

- Health Insurance
- Medicare
- Long-Term Care / Life Insurance
- Medication Snapshot
- Doctors & Pharmacy

10. Final Arrangements & Wishes

- Funeral / Burial / Cremation
- Prepaid Arrangements
- Cemetery Plot Documentation
- Military Discharge Papers (DD214)
- Personal Notes

11. Emergency & Digital Access

- Emergency Contacts
- Digital Account Checklist
- Safe Deposit Box Information
- Facebook Legacy Contact

12. Pets & Care Instructions

- Pet Information & Care
- Pet Health Records
- Veterinarian & Service Providers
- Pet Caregiver Designation

Optional

- Financial Annual Organizer - Receipts
- Password Storage Book



**Customized. Organized.
Accessible when it matters most.**

Legal, tax, and financial advice should always be provided by licensed professionals.