





# L.I.F.E. Important Information

## Names and Addresses- Medical Equipment Provider

Name	Address:	City	State	ZIP	Phone	email

## Names and Addresses- Lawyers

Name	Address:	City	State	ZIP	Phone	email

## Names and Addresses- Financial Advisors

Name	Address:	City	State	ZIP	Phone	email

## Insurance (Home, Auto, Boat, etc.)

Agent's Name	Policy Number	Type	Card Location	Phone

## Investments (Stocks, Bonds, Real Estate)

Where Held	Account Number	Web site	Username	Password



# L.I.F.E. Important Information

## Bank Accounts

Institution	Account Number	Web site	Username	Password

Location of Safety Deposit Box and Key:

## Mortgage and Bills: How and when paid

Bill	Account Number	Where Paid	Amount	Due Date
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**Rent/ Mortgage**

**Electric**

**Gas/ Oil**

**Telephone**

**Cable**

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# L.I.F.E. Important Information

Online (email, membership, etc.) Accounts and passwords

Account	Password

## Checklist of Important Documents

Document	Location
<input type="checkbox"/> Copy of most recent income tax return, Tax ID, W-2s	_____
<input type="checkbox"/> Will and other legal documents with an original signature	_____
<input type="checkbox"/> Original Deed of Trust for the Home	_____
<input type="checkbox"/> Car Title(s) and Registration(s)	_____
<input type="checkbox"/> Insurance policies	_____
<input type="checkbox"/> Home	_____
<input type="checkbox"/> Auto	_____
<input type="checkbox"/> Life	_____
<input type="checkbox"/> Health	_____
<input type="checkbox"/> Long-Term Care	_____

Insurance information - include policy numbers and agents' names and phone numbers, copies of insurance cards

	Policy#	Agent Name	Agent Phone Number
<input type="checkbox"/> Life	_____	_____	_____
<input type="checkbox"/> Health	_____	_____	_____
<input type="checkbox"/> Long-term care	_____	_____	_____
<input type="checkbox"/> Home Owners/ Renters	_____	_____	_____
<input type="checkbox"/> Auto	_____	_____	_____

## FILES – You will need when managing the will and estate

File	Location
<input type="checkbox"/> Birth Certificates/ Adoption,	_____
<input type="checkbox"/> Marriage Certificates	_____
<input type="checkbox"/> Divorce paperwork, Social Security Cards,	_____
<input type="checkbox"/> Passports / Citizenship	_____
<input type="checkbox"/> Military papers (DD214)	_____