|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| HEALTH |  | **AFTER-DEATH** |  | **LEGAL** |
| **POA for Healthcare** |  | **Disposition Agent** |  | Last Will & Testament/ Trusts |
| Living Will/Healthcare  Directive(s) |  | Funeral Home/ Disposition Direction |  | Passport/Travel/ License(s) |
| **Dementia Directives** |  | After-Death Instructions |  | Marriage/Domestic  Partner, Adoption |
| Medicare/Medicaid |  | Vital Statistics |  | Divorce, Prenup, Postnup |
| End-of-Life Values |  | Organ Donation |  | **Contracts** |
| **Medical Records** |  | Ceremony/  Gathering |  | Military Records |
| **POLST** |  | **Eulogy/Obituary** |  | Birth Certificate |
|  |  | Designation of Personal items |  |  |
|  |  |  |  |  |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  |  | | --- | --- | | **FINANCE** |  | | **POA for Finance** | **POA for Finance** | | Bills/Debts: Amounts & Due Dates | Bills/Debts: Amounts & Due Dates | | **Mortgage, Deeds, Titles, Promissory** | **Mortgage, Deeds, Titles, Promissory** | | Vehicle Title, Registration | Vehicle Title, Registration | | Insurance Policies | Insurance Policies | | **Employee/Employer** | **Employee/Employer** | | **Stocks, Bonds, Annuities** | **Stocks, Bonds, Annuities** | | Bank Acct/Information | Bank Acct/Information | | **Tax Info/Return** | **Tax Info/Return** | |
| **POA for Finance** | |  | Pension  Social Security |  |  |

Bills/Debts: Amounts & Social Security

Due Dates

**Mortgage, Deeds, Retirement Accounts**

**Titles, Promissory**

**Vehicle Title, Usernames, Acct #s**

**Registration Passwords**

Insurance Policies Codes, Locks, Keys

**Employer/Employee**

**Stock, Bonds,**

**Annuities**

**Bank Acct/Banking**

**Information**

**Tax Info/Return(s)**