

LifeKeeper

ESSENTIALS

8 Essential Sections

ORGANIZE | PROTECT | PREPARE
FOR WHAT MATTERS MOST

BLUEROCK | LifeKeeper

ESSENTIALS

Organize • Prepare • Share the location, not sensitive access credentials

A Printable Family Information Binder System

8 organized sections | Cover • contents • printable tab labels • divider sheets • worksheets

Prepared by Bluerock Business & Financial Services, LLC | www.bluerockbfs.com | 1-800-918-6710

This is an organization tool, not legal, tax, financial, or medical advice. Keep original documents, credentials, and sensitive identifiers securely stored. Document requirements depend on your circumstances.

Getting Started

Simple assembly instructions

- Print this kit single-sided on US Letter paper.
- Use a 3-ring binder with numbered or write-on index dividers. Print and cut the tab labels page, or copy the labels onto commercially available divider tabs.
- Insert the table of contents first, then each section divider and its relevant worksheets.
- Use document-location references rather than keeping passwords, full account numbers, or irreplaceable originals in an unsecured binder.
- Review the binder every 6–12 months and after major life changes. Tell a trusted authorized person where it is stored.

IMPORTANT: A power of attorney generally ends at death. Estate and probate authority may be different. Consult a qualified professional for legal questions.

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Printable Divider Tab Labels

Cut out or transfer to adhesive index tabs

01	Personal & Family Records
02	Medical & Healthcare
03	Legal Documents
04	Banking & Finances
05	Insurance & Benefits
06	Property & Household
07	Digital Information
08	Final Wishes & Arrangements

TIP: Standard tab sizes vary by manufacturer. These labels are a master reference; scale or trim to match your divider set.

01 Personal & Family Records

SECTION DIVIDER

Suggested records and information:

- ☐ Identity records
- ☐ family contacts
- ☐ birth/marriage certificates
- ☐ location of originals

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

01 Personal & Family Records

SECTION INVENTORY WORKSHEET

Use this page to identify documents and where to find them. Avoid recording passwords or complete account numbers.

Document / item	Location / contact	Reviewed

Notes / next steps:

02 Medical & Healthcare

SECTION DIVIDER

Suggested records and information:

- ☐ Providers
- ☐ medication and allergy lists
- ☐ medical summary
- ☐ health coverage

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

02 Medical & Healthcare

SECTION INVENTORY WORKSHEET

Use this page to identify documents and where to find them. Avoid recording passwords or complete account numbers.

Document / item	Location / contact	Reviewed

Notes / next steps:

03 Legal Documents

SECTION DIVIDER

Suggested records and information:

- ☐ Will
- ☐ financial and medical POAs
- ☐ directives
- ☐ attorney contact
- ☐ original locations

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

03 Legal Documents

SECTION INVENTORY WORKSHEET

Use this page to identify documents and where to find them. Avoid recording passwords or complete account numbers.

Document / item	Location / contact	Reviewed

Notes / next steps:

04 Banking & Finances

SECTION DIVIDER

Suggested records and information:

- ☐ Bank/investment inventory
- ☐ income sources
- ☐ loans
- ☐ financial contacts

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

04 Banking & Finances

SECTION INVENTORY WORKSHEET

Use this page to identify documents and where to find them. Avoid recording passwords or complete account numbers.

Document / item	Location / contact	Reviewed

Notes / next steps:

05 Insurance & Benefits

SECTION DIVIDER

Suggested records and information:

- ☐ Life and property insurance
- ☐ Medicare
- ☐ Social Security
- ☐ veterans benefits

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

05 Insurance & Benefits

SECTION INVENTORY WORKSHEET

Use this page to identify documents and where to find them. Avoid recording passwords or complete account numbers.

Document / item	Location / contact	Reviewed

Notes / next steps:

06 Property & Household

SECTION DIVIDER

Suggested records and information:

- ☐ Real estate
- ☐ vehicles
- ☐ utility providers
- ☐ recurring household expenses

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

06 Property & Household

SECTION INVENTORY WORKSHEET

Use this page to identify documents and where to find them. Avoid recording passwords or complete account numbers.

Document / item	Location / contact	Reviewed

Notes / next steps:

07 Digital Information

SECTION DIVIDER

Suggested records and information:

- ☐ Digital account inventory
- ☐ subscription list
- ☐ secure access instructions

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

07 Digital Information

SECTION INVENTORY WORKSHEET

Use this page to identify documents and where to find them. Avoid recording passwords or complete account numbers.

Document / item	Location / contact	Reviewed

Notes / next steps:

08 Final Wishes & Arrangements

SECTION DIVIDER

Suggested records and information:

- ☐ Funeral preferences
- ☐ prepaid arrangements
- ☐ key contacts
- ☐ disposition instructions

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

08 Final Wishes & Arrangements

SECTION INVENTORY WORKSHEET

Use this page to identify documents and where to find them. Avoid recording passwords or complete account numbers.

Document / item	Location / contact	Reviewed

Notes / next steps: