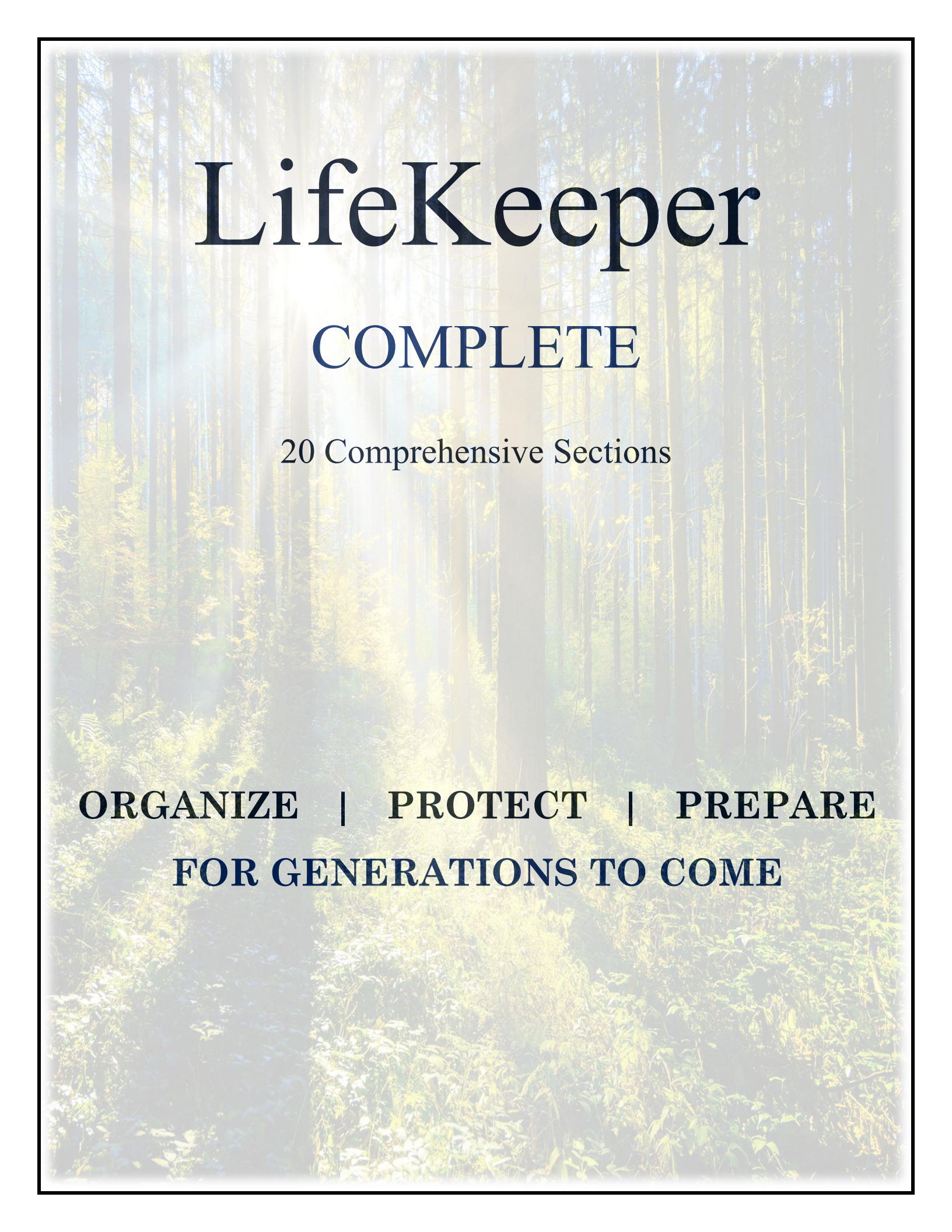




LifeKeeper

COMPLETE

20 Comprehensive Sections

ORGANIZE | PROTECT | PREPARE
FOR GENERATIONS TO COME

BLUEROCK | LifeKeeper

COMPLETE

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

A printable family information binder system

20 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.

Table of Contents

Complete | Section directory

- 01 Personal Identification**
- 02 Family & Emergency Contacts**
- 03 Marriage & Family Records**
- 04 Important Professional Contacts**
- 05 Medical History & Care Team**
- 06 Health Insurance & Coverage**
- 07 Healthcare Directives & Permissions**
- 08 Legal & Estate Planning Records**
- 09 Banking & Cash Accounts**
- 10 Investments & Retirement**
- 11 Income & Government Benefits**
- 12 Insurance Policies & Claims**
- 13 Debts & Financial Obligations**
- 14 Taxes & Financial Statements**
- 15 Real Estate & Property**
- 16 Vehicles & Valuable Assets**
- 17 Household Operations**
- 18 Digital Accounts & Access**
- 19 Caregiving & Daily Support**
- 20 Final Arrangements & After-Loss**

Printable Divider Tab Labels

Cut out or transfer to adhesive index tabs

01	Personal Identification
02	Family & Emergency Contacts
03	Marriage & Family Records
04	Important Professional Contacts
05	Medical History & Care Team
06	Health Insurance & Coverage
07	Healthcare Directives & Permissions
08	Legal & Estate Planning Records
09	Banking & Cash Accounts
10	Investments & Retirement
11	Income & Government Benefits
12	Insurance Policies & Claims
13	Debts & Financial Obligations
14	Taxes & Financial Statements
15	Real Estate & Property
16	Vehicles & Valuable Assets
17	Household Operations
18	Digital Accounts & Access
19	Caregiving & Daily Support
20	Final Arrangements & After-Loss

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

01 Personal Identification

SECTION DIVIDER

Suggested records and information:

☐ IDs, citizenship, vital records, locations

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

01 Personal Identification

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 Family & Emergency Contacts

SECTION DIVIDER

Suggested records and information:

☐ Relatives, trusted contacts, notification order

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

02 Family & Emergency Contacts

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 Marriage & Family Records

SECTION DIVIDER

Suggested records and information:

☐ Marriage/divorce records, family agreements

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

03 Marriage & 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:

04 Important Professional Contacts

SECTION DIVIDER

Suggested records and information:

☐ Attorney, accountant, banker, insurance agents

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

04 Important Professional Contacts

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 Medical History & Care Team

SECTION DIVIDER

Suggested records and information:

☐ Conditions, medications, allergies, physicians

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

05 Medical History & Care Team

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 Health Insurance & Coverage

SECTION DIVIDER

Suggested records and information:

☐ Medicare, Medicaid, supplements, policy contacts

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

06 Health Insurance & Coverage

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 Healthcare Directives & Permissions

SECTION DIVIDER

Suggested records and information:

☐ Medical POA, directives, HIPAA releases

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

07 Healthcare Directives & Permissions

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 Legal & Estate Planning Records

SECTION DIVIDER

Suggested records and information:

☐ Will, trusts, durable POA, legal contacts

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

08 Legal & Estate Planning 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:

09 Banking & Cash Accounts

SECTION DIVIDER

Suggested records and information:

☐ Institutions, account types, authorized contacts

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

09 Banking & Cash Accounts

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:

10 Investments & Retirement

SECTION DIVIDER

Suggested records and information:

☐ IRAs, brokerage, pensions, plan contacts

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

10 Investments & Retirement

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:

11 Income & Government Benefits

SECTION DIVIDER

Suggested records and information:

☐ Social Security, VA, employment, benefits

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

11 Income & Government 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:

12 Insurance Policies & Claims

SECTION DIVIDER

Suggested records and information:

☐ Life, property, LTC, claims information

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

12 Insurance Policies & Claims

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:

13 Debts & Financial Obligations

SECTION DIVIDER

Suggested records and information:

☐ Loans, credit cards, payment due dates

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

13 Debts & Financial Obligations

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:

14 Taxes & Financial Statements

SECTION DIVIDER

Suggested records and information:

☐ Tax returns, accountant, filing records

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

14 Taxes & Financial Statements

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:

15 Real Estate & Property

SECTION DIVIDER

Suggested records and information:

☐ Deeds, mortgages, property taxes, leases

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

15 Real Estate & Property

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:

16 Vehicles & Valuable Assets

SECTION DIVIDER

Suggested records and information:

☐ Titles, registrations, valuables inventory

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

16 Vehicles & Valuable Assets

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:

17 Household Operations

SECTION DIVIDER

Suggested records and information:

☐ Utilities, vendors, subscriptions, maintenance

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

17 Household Operations

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:

18 Digital Accounts & Access

SECTION DIVIDER

Suggested records and information:

☐ Email, online accounts, password-manager instructions

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

18 Digital Accounts & Access

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:

19 Caregiving & Daily Support

SECTION DIVIDER

Suggested records and information:

☐ Care plans, caregiver schedules, services

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

19 Caregiving & Daily Support

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:

20 Final Arrangements & After-Loss

SECTION DIVIDER

Suggested records and information:

☐ Funeral plans, notifications, estate task log

Where originals are stored: _____

Who is authorized to access them: _____

Last reviewed: _____

20 Final Arrangements & After-Loss

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:

Emergency Action Sheet

ADDITIONAL COMPLETE EDITION WORKSHEET

Primary contact _____

Backup contact _____

Primary physician _____

Preferred hospital _____

Document storage location _____

Critical considerations _____

Additional notes:

Healthcare Provider Directory

ADDITIONAL COMPLETE EDITION WORKSHEET

Provider name _____

Specialty _____

Phone _____

Address _____

Next appointment _____

Notes _____

Additional notes:

Insurance Policy Tracker

ADDITIONAL COMPLETE EDITION WORKSHEET

Policy type _____

Company _____

Policy reference (last four only) _____

Agent _____

Renewal date _____

Claims contact _____

Additional notes:

Recurring Bills & Subscriptions

ADDITIONAL COMPLETE EDITION WORKSHEET

Provider _____

Purpose _____

Due date _____

Payment source (no full numbers) _____

Contact _____

Cancellation notes _____

Additional notes:

After-Loss Administration Checklist

ADDITIONAL COMPLETE EDITION WORKSHEET

Death certificates requested _____

Funeral provider contacted _____

Attorney or executor contacted _____

Insurers notified _____

Benefits agencies contacted _____

Financial institutions contacted _____

Additional notes:
