

# IMPORTANT DOCUMENTS

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**FOR:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

## 1. WILL

A Last **Will** and Testament dictates the way your assets **will** be distributed and utilized following your death.

TASKS	DATE	COMPLETE

## 2. LIVING WILL

A **living will** states your wishes regarding life support in the event that you are in a persistent vegetative state or irreversible coma.

TASKS	DATE	COMPLETE

## 3. IDENTIFICATION

Includes your birth certificate, marriage license, divorce papers, passport, and Social Security Card.

TASKS	DATE	COMPLETE

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## 4. LIFE INSURANCE

Include the phone number to call, the policy number, the amount, and the date issued.

TASKS	DATE	COMPLETE

## 5. INVESTMENTS

Your retirement plan includes all investments, pension plan, retirement funds, and advisor's contact info.

TASKS	DATE	COMPLETE

## 6. HOUSE INFORMATION

Include the house deed, mortgage, bill of sale, home association and the utilities you pay monthly.

TASKS	DATE	COMPLETE

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## 7. TITLES

Include a copy of all titles for cars, trucks, boats, loans and other assets.

TASKS	DATE	COMPLETE

## 8. FUNERAL PLANS & BURIAL INFORMATION

TASKS	DATE	COMPLETE

## 9. MEDICAL INFORMATION & LIST OF CURRENT MEDICATIONS

Include a list of medications, your medical binder/file, and lists of current doctors and phone numbers.

TASKS	DATE	COMPLETE

## 10. INSTRUCTIONS UPON DEATH

Use this list: <https://everloved.com/articles/end-of-life-affairs/what-to-do-when-someone-dies-checklist/>