



Personal & Financial Organizational Checklist

Personal Data

- ✓ Copies of Birth Certificate, Marriage Certificate, Driver's License, Passport, and Health Insurance Cards (include location of originals)

Emergency Contact List

- ✓ Family members, friends, executor/trustee; include name, address, phone/cell/office numbers, email

Medical Information

- ✓ List of medical providers, current medications, surgeries/ ailments/allergies & immunizations

Financial & Insurance Holdings

- ✓ List of accounts, type, and name of advisor/agent and contact info
- ✓ Copies of recent statements

Tangible Holdings

- ✓ List of titles to home(s), cars, boats, etc. and title location
- ✓ List of valuables, their location, and desired disposition

Tax Information

- ✓ Appraisals of real estate & collectibles, location of tax returns, contact info of tax advisor

Estate Planning Documents

- ✓ Will, Trust, Living Will, Durable Power of Attorney, Medical Power of Attorney and location of originals

Last Wishes

- ✓ Funeral plans, cemetery plans, obituary info/photo, flowers, donations, music, pall bearers

Lineweaver Financial Group

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