

MemoryBanc®

Simplify your life by organizing and storing personal documents and details in one location.

Which papers are important?

The following documents and account details will make your life easier by having everything easily accessible in one location. Additionally, in case of emergency, having this information organized will allow your loved ones to easily meet your needs and follow your personal wishes.

The Essentials:

- Will
- Living Will
- Do-not-resuscitate order / Medical directives
- Trust
- Specific instructions regarding your wishes, children, pets and burial
- Durable Power-of-Attorney (many financial institutions won't recognize this if it is not on their letterhead)
- Durable health care power of attorney
- Single location of documents and as needed instructions and access to safe deposit box or home safe

Personal Documents

- Birth certificate / Immigration documents
- Social Security number
- Marriage license / divorce papers
- Driving license
- Military identification / service records
- Other professional license numbers / educational transcripts

- Make **color** copies of front and back
- Get ID numbers and expiration dates

Financial Documents

- Income sources and pay cycles
- Bank accounts
- Retirement, investment and brokerage accounts
- Stock certificates
- Savings bonds
- Life insurance policies - deductibles, what's covered, who is covered
- Partnership and corporate operating agreements
- Tax returns
- Other Asset Details- appraisal, location and inventory
- Credit Card accounts - make copies and note annual fees, interest rate and payment cycle
- Loans, debts or mortgage accounts - type, amount borrowed, Interest rate, payment due dates/cycle

- Account numbers, type of account, contact information , renewal dates
- Beneficiaries
- Access information: web site, username, password, PIN

Medical Documents

- Personal medical history
- Family medical history
- Doctor visits and outcome
- List of current prescriptions and dosage (ICE: on your phone)
- List of healthcare providers
- Medical insurance and any related website, username, password and PIN as established

Online

Document all those not previously included with the above account documentation.

- Email
- Social media
- Online services

- Access information: web site, username, password, PIN
- Associated credit cards, billing cycles and fees

Household

- Home, land or cemetery deeds
- Documentation on any home or land improvements with receipts
- Auto titles, loan details
- Service plan records, warranty, schedules, repair documentation and preferred providers
- Utility accounts (power, gas, phone, cable, water, sewer)
- Other Services (meals, cleaning, lawn, sprinkler)
- Pets: care, medications, services

- Account numbers, billing cycles, contact information , average fees
- Access information: web site, username, password, PIN

Important Contacts

- Name / Company
- Address
- Phone
- Email
- List documents they are holding, have created or that bind you
- Personal contacts & relationship

- Financial Advisor
- Attorney
- Accountant
- Insurance Agent
- Personal Representative / Executor Name
- Spiritual / Clergy
- Realtor

Subscriptions and Memberships

- Social and health memberships
- Subscriptions

Account Numbers, expiration dates, associated fees and billing cycles

Business Records

- Customer List / Key Customers
- Incorporation Documents
- Copyright / Trademark Records
- Business Insurance Documents
- Intellectual Property / Non-Compete Agreements
- Vendor Contracts and Vendor Contacts
- Contact information or location of Accounting and Personnel record along with access instructions.

If you need help in getting your important records organized:

1. Purchase a binder and start collecting these details; or
2. Order the *MemoryBanc Register* (www.MemoryBanc.com/Register) that guides you through the collection of this information. Your order will include both the custom binder and a bonus thumb drive edition.

Additional Estate Management Services include:

- Presentations: We provide up to a 1-hour presentation to organize and teach attendees the importance of the items listed on this hand-out.
- Do-it-Now Service: We assist you in collecting and recording your personal documents and details in 2 two-hour sessions.
- Vital Records Storage: We store your information and letters in a secure storage facility and return or release them to loved ones based on your specific guidance.



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