

## Which papers are important?

The following documents, account details, usernames and pass codes will make your life easier by having everything accessible in one location. Additionally, in the event of an emergency, having this information organized will allow your loved ones to help you and complements your estate planning papers.

### The Essentials:

- Durable Power-of-Attorney
- Will
- Living Will
- Do-not-resuscitate order / Medical directives
- Specific instructions regarding your wishes, children, pets and burial
- 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 & Estate Lawyer
- Accountant
- Insurance Agent
- Personal Representative / Executor Name
- Spiritual / Clergy
- Realtor

Account Numbers, expiration dates, associated fees and billing cycles

## Subscriptions and Memberships

- Social and health memberships
- Subscriptions

## 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



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## To get started:

1. Purchase a binder and a set of tab separators and start collecting these details
2. Visit your local book store and get a copy of *MemoryBanc: Your Workbook for Organizing Life*
3. Order the *MemoryBanc Register* ([www.MemoryBanc.com](http://www.MemoryBanc.com)) that guides you through the collection of this information and includes free refills for life. You can opt to order the Flash Drive edition for a paperless solution

To learn about our classes, wellness programs, collection services and storage, contact our office.

## MemoryBanc®

4601 N. Fairfax Street #1200 Arlington, VA 22203 ▪ (703) 436.2827 ▪ [www.MemoryBanc.com](http://www.MemoryBanc.com)