



MemoryBanc®

The Award-Winning
System for Organizing Life

Important Documents & Accounts Checklist

Use the check box to note which items you have collected. Cross off items that do not apply to you.

- Color copies of all identification and credit cards in wallet.

The Essentials:

- Durable power of attorney
- Will/trust
- Medical (Healthcare) power of attorney
- Do-not-resuscitate order/living will
- Specific instructions regarding your wishes, children, pets, and burial
- Single location of documents, as-needed instructions, and access to safe deposit box or home safe

Personal Documents

- Birth certificate/immigration documents color copy
- Social Security card/number color copy
- Marriage license/divorce papers color copy
- Driver's license color copy
- Military identification/service records color copy
- Other professional license numbers/educational transcripts

Financial Documents

- Income sources and pay cycles
- Bank accounts ±
- Retirement, investment, and brokerage accounts ±
- Stock certificates
- Savings bonds
- Partnership and corporate operating agreements
- Life insurance policies – deductibles, what's covered, who is covered ±
- 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 ±
- Notice of final loan payments – zero balance statement, cancelled notice with original loan papers

Online

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

- Security questions
- Email ±
- Social media ±
- Online services ±

Household

- Home, land, or cemetery deeds
- Pets – care, medications, services
- Auto titles, loan details, Department of Motor Vehicles (DMV) account, E-ZPass account ±
- Service plan records, warranty, schedules, repair documentation, and preferred providers ±
- Documentation on any home or land improvements with receipts
- Utility accounts (power, gas, phone, cable, water, sewer) ±
- Other services (meals, cleaning, lawn, sprinkler) ±

Medical Documents

- Personal medical history ±
- Family medical history
- Doctor visits and outcome ±
- List of current prescriptions and dosage
- List of healthcare providers
- Medical insurance ±

Important Contacts

- Financial advisor
- Attorney and estate lawyer
- Accountant
- Insurance agent
- Personal representative/executor name
- Spiritual/clergy
- Realtor
- Personal contacts (friends, relatives, colleagues)

- Name/company
- Address
- Phone
- Email
- List documents they are holding, have created, or tie that connects you to the individual

Subscriptions & Memberships

- Social club and health memberships
- Frequent flyer, hotel, travel award programs
- Subscriptions ±

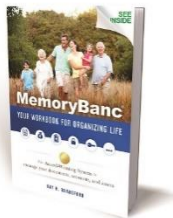
Important Details

- Birthdays and other important dates
- Schedule
- Pet Care

BONUS: Small Business Owners

- Customer list/key customers; Vendor contracts and vendor contacts ±
- Incorporation documents; Copyright/trademark records; Business insurance documents ±
- Intellectual property/non-compete agreements ±
- Contact information or location of accounting, personnel records, and succession plan, along with access instructions ±

± This symbol represents those accounts that may have online access, usernames, passcodes, PINs, and security questions that were provided and should also be included in the documentation.



This worksheet is based on the information found in the best-selling book *MemoryBanc: Your Workbook for Organizing Life*. You can get the award-winning system to organize your documents, accounts, and assets that will prompt you through the collection of your important information from your favorite bookstore, online retailer, and MemoryBanc.com.

If you need help getting this information organized, contact us at 703.436.2827.

MemoryBanc • 4601 N. Fairfax Drive #1200, Arlington, VA 22203 • MemoryBanc.com