|  |  |  |  |
| --- | --- | --- | --- |
|  | **Account No.** | **Financial Institution** | **Username/Password** |
| **Health Directives** |  |  |  |
| **Power of Attorney**  Durable POA  Medical POA |  |  |  |
| **Will**  Will  Living Will |  |  |  |
| **Trust**  Trust  Pour-Over Trust  Lady Bird Deed |  |  |  |
| **Bank Accounts**:  Checking  Savings  Money Market  - |  |  |  |
| **Financial Institution**:  IRA  Pension |  |  |  |
| **Government Benefits**  Soc. Security  Medicare/Medicaid  - |  |  |  |
| **Life Insurance**  - |  |  |  |
| **Home**  Mortgage - Title  Home Owners Insur. |  |  |  |
| **Vehicles**  -  - |  |  |  |
| **Stocks/Bonds**  -  -  - |  |  |  |
| **Safety Deposit Box**  - Documents  - Jewelry  - Other Valuables  - |  |  |  |
| **Credit Cards**  -  -  -  -  -  -  -  - |  | **Company** |  |
|  |  |  |  |
| **Income**  Social Security  Pension  IRA w/drawals  Other income |  |  |  |
| **Debts**  Homeowner’s Insur.  Car Insur.  Gas  Electric  Phone/Cable  Cell Phone  Property Taxes  Credit cards  Association Fee  - |  | **Company** |  |
| **Belongings** |  |  |  |
| **Biographical Info**  Birth Cert.,  Marriage Lic.,  Social Security.  Cemetery |  |  |  |
| Family (extended) |  |  |  |
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