

## **What papers or information should I keep in the box or binder?**

Anything useful should you *die or become incapacitated*. Especially if you are single or if you want to make life less stressful for a partner or your family. Most of the information listed is only needed for estate settlement.

**Here is a list to get you started.**

Photocopy of your ID or driver's license

Photocopy of your health insurance card(s)

A list of your medications/prescriptions

All your life insurance policies

Long-term care insurance

A copy of your:

- CURRENT living will
- CURRENT power of attorney
- CURRENT will

The names of your power of attorney and your power of health care

**A suggested list of information to also include in your file box or binder:**

Funeral and burial plans

Information about your burial plot and monument

The location of your safe deposit box and its key

Contact information for your:

Lawyer

Accountant

Financial planner

Veterinarian

Location of your most recent tax return if you don't have a CPA prepare them

A list of bills you have paid automatically

Account numbers for your:

- Financial institutions (banks, credit unions)
- Retirement investments
- Credit cards
- Mortgage Loan
- Other loans

Investment information for stocks certificates and CDs

## Important Passwords

If you have an off-site storage unit, include contact information

Cell phone password and provider information

Social security number

Birthdate

Employer information

## **Passwords to accounts you want to be deleted:**

Email

Social media

Computer password

Cell phone password

Jill Annis, Simply Organized, LLC, 608-575-7467,  
Jill@SimplyOrganizedwithJill.com