

The 60 Documents

YOU NEED ORGANIZED BEFORE YOU DIE Checklist



My Village Map



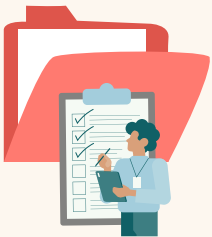
- Copy of your My Village Map listing all your professional, community, family, and friends contacts and roles of support

Birth to Death Certificates



- Birth Certificate
- Marriage License
- Divorce Papers
- Death Certificates

Legal Ease



- Will
 - Digital clause
- Letter of Instruction
- Trust Documents
- Ethical or Spiritual Will (non-legal)
- My post death wishes check list
- Durable Power of Attorney for Finances (DPOA)
- Durable Health-care Power of Attorney (DPOA) or Healthcare Proxy

Health Care Vault



- Personal and family health history
- Authorization to release healthcare information
- Living Will/Advance Directive
 - Physical implants
- Do-not-resuscitate order (DNR)
- Physician's Orders for Life Sustaining Treatment (POLST)

Proof of Ownership



- Housing, land, cemetery deeds
- Tax returns
- Vehicle titles
- Escrow mortgage accounts
- Proof of loans made, and debts owed
- Stock Certificates, Bonds, Wealth management accounts
- Partnership and corporate operating agreements

Life Insurance and Retirement



- Life-insurance policies
- Individual retirement accounts (IRA)
- 401 (k) accounts
- Pension Documents
- Annuity Contracts

Money Matters



- List of bank and wealth management accounts
- List of usernames and passwords
- List of safe-deposit boxes and keys/combinations
- Daily Money Manager, CPA, other account managers' contact information

Contracts



- Rental lease
- Senior Housing Contract
- In home care agreement

Identification Items



- Social Security Card
- Driver's License
- Passport
- Military ID
- Military Discharge Papers
- Copies of Credit Cards
- Membership Cards

Digital Footprint



- Password Keeper
- List of Digital Assets
- Social Media Accounts
- Email Accounts
- Health and Benefits
- Ecommerce
- SMART home accounts/network
- Contacts/Address Book
- Calendar
- External hard drives and data banks, locations

Pet Documents



- Vet contact where medical records kept
- Vaccine list
- Diet outline
- Daily Schedule
- Care providers
- Comfort care process
- Guardianship papers in event of your death

