

# REVIEW CHECKLIST

| ITEM                                | DATE DISCUSSED | DATE COMPLETED |
|-------------------------------------|----------------|----------------|
| <b>HEALTH</b>                       |                |                |
| Emergency Contacts                  |                |                |
| Medications & Supplements           |                |                |
| Health Insurance                    |                |                |
| Health Information & History        |                |                |
| Living Will/Advance Directive       |                |                |
| Medical Power of Attorney           |                |                |
| Durable/Springing Power of Attorney |                |                |
| <b>BANKING &amp; INVESTMENTS</b>    |                |                |
| Bank Accounts                       |                |                |
| Investments                         |                |                |
| Retirement Accounts                 |                |                |
| Safe Deposit Boxes                  |                |                |
| Credit Cards                        |                |                |
| Mortgages and Loans                 |                |                |
| Important Financial Contacts        |                |                |
| <b>INSURANCE</b>                    |                |                |
| Personal Insurance                  |                |                |
| Property Insurance                  |                |                |
| <b>ESTATE</b>                       |                |                |
| Will and Estate Plan                |                |                |
| Funeral Arrangements                |                |                |
| Other Important Information         |                |                |
| <b>PERSONAL</b>                     |                |                |
| Identification                      |                |                |
| Property and Titles                 |                |                |
| Important Tax Documents             |                |                |
| Online Accounts and Passwords       |                |                |
| Memberships and Subscriptions       |                |                |
| Other Important Documents           |                |                |
| <b>BLANK</b>                        |                |                |
|                                     |                |                |
|                                     |                |                |