

REVIEW CHECKLIST

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