

# **Life Information Emergency Checklist**

***Purpose: This document helps a trusted person locate important information if something happens to me.***

## **Personal & Identity**

- Birth Certificate
- Social Security Card
- Driver's License / ID
- Passport
- Marriage / Divorce Documents

## **Emergency & Medical**

- Emergency Contacts
- Primary Doctor Info
- Medications List
- Health Insurance Info
- Advance Directive / Living Will

## **Financial**

- Bank Accounts
- Credit Cards
- Loans / Mortgages
- Investment Accounts
- Retirement Accounts

## **Insurance**

- Health Insurance
- Life Insurance
- Auto Insurance
- Homeowners / Renters Insurance

## **Legal**

- Will
- Trust Documents
- Power of Attorney
- Guardianship Instructions

## **Digital**

- Password Manager Access Instructions
- Email Accounts
- Cloud Storage
- Subscription Services
- Digital Legacy Instructions

## **Taxes**

- Recent Tax Returns
- W-2s / 1099s
- Property Tax Records

## **Trusted Contact Information**

Name:

Relationship:

Phone / Email:

## **Important Notes / Instructions**

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