

IMPORTANT DOCUMENTS LIST

Adapted from [resource by Plan Well Guide](#)

Health Planning Documents

- Current advance serious illness plan
- Medical emergency contacts
- List of medical conditions and allergies
- Prescriptions

Signed Legal Forms

- Will/trust
- Power of attorney for finances
- Power of attorney for personal care/personal directive

Insurance Policies and Beneficiary Documents

- Life insurance policy
- Health insurance
- Long-term care insurance
- Disability insurance

Financial Documents

- A list of bank accounts
- Retirement information
- Investment portfolio information
- Debt/loan information
- Most recent tax return
- RRSPs
- Credit card information
- Pension information
- Safety deposit box/home safe location and codes

Property Documents

- Mortgage or rental information
- Deeds
- Leases
- Titles
- Home-owners' or renters' insurance policies
- Real estate rentals or other investments

Copies of Identification Documents

- Drivers license/organ donor card
- Passport/citizenship papers
- Birth certificate
- Marriage certificate
- Divorce certificate
- Military/veteran benefit details
- Social insurance number

Passwords

- Passwords to various personal websites
- Online payment accounts for utilities
- Online banking account information
- Home alarm system or other security

Pre-Made Funeral Arrangements

- Receipts for pre-paid expenses (plot, casket, gravestone)
- Veteran burial benefit information
- Contact information to a specific fraternal or religious group organizing funeral or ceremony
- Personal wishes for the funeral (music played, mementos displayed, religious passages to be read)

Letters of Instruction

- Guardian letter: how to care for your children/dependents
- Pet care plan: how to care for your pet
- List of who should receive certain sentimental items
- Practical information about running your home

Legacy Documents

- Pre-written obituary or eulogy
- Photos for your obituary or memorial
- Ethical will
- Legacy letter to family members, friends, loved ones

And anything else you think will be helpful to those providing care!

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