

# IMPORTANT DOCUMENTS LIST

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

## Health Planning Documents

- Current Advance serious Illness Plan, dated
- 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 banking accounts including:
- 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

## Letters of Instruction

- Guardian letter: how to care for you 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 / managing subscriptions

## 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 left behind!**