

ESSENTIAL PLANNING CHECKLIST

Get all of your (and your family's) essential information in order

This checklist is the ideal place to start when you're not sure where to start.

Here's what it helps you and your family identify and get organized:

- ✓ Who are your most important contacts?
- ✓ Where do you keep all your vital forms of identification?
- ✓ Have you completed any official & legal documents?
- ✓ What, if any, medical conditions are you currently managing?
- ✓ Are all your financial details and insurance policies easy to access?
- ✓ How do you keep track of passwords?

A DIGITAL HELPING HAND

All of this vital information can easily be put into an Everplan, which you can securely update and share with the people you love and trust. Learn more at **everplans.com**.

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IMPORTANT CONTACTS

These are the people who can help your family when it's needed most. Make sure they know how to reach them.

- ❑ Emergency: _____
- ❑ Work: _____
- ❑ Primary Doctor: _____
- ❑ Financial Advisor: _____
- ❑ Insurance Agent: _____
- ❑ Attorney: _____
- ❑ Other: _____

DON'T FORGET YOUR PETS! Share important details like diet, veterinarian, and other helpful things:

_____

IDS/VITAL DOCUMENTS

Gather all these up and take photos of the ones you regularly use and keep them in a safe place.

- ❑ Birth Certificate
- ❑ Social Security Card
- ❑ Passport
- ❑ Marriage Certificate
- ❑ Driver's License
- ❑ Armed Forces ID
- ❑ Citizenship Docs
- ❑ Divorce Decree
- ❑ Other: _____

LEGAL DOCS & CONTRACTS

If you have any of these documents, let it be known. If you don't, fear not. Everplans.com can help you understand why you need them and how to get them.

- ❑ Power of Attorney
- ❑ Last Will and Testament
- ❑ Trust Paperwork & Details
- ❑ Property Ownership/Rental (Deed/Lease/Contracts)
- ❑ Vehicle Ownership (Title/Agreement)
- ❑ Other: _____

BANKING & ASSETS

This includes bank accounts, investments, and benefits. Have a recent account statement for each, location of related items and account/login and password for online management.

- ❑ Checking
- ❑ Savings
- ❑ Investments
- ❑ Stocks/Bonds
- ❑ Mutual Funds
- ❑ 401(k)
- ❑ Traditional IRA
- ❑ Roth IRA
- ❑ Pension (SEP / SARSEP)
- ❑ Military Benefits
- ❑ 403(b)
- ❑ Certificate Of Deposit
- ❑ Other: _____

BILLS & LOANS

Have a recent account statement for each account and login/password for online management.

- ❑ Mortgage / Rent
- ❑ Vehicle Payments
- ❑ Loans
- ❑ Alimony/Child Support
- ❑ Other: _____

CREDIT CARDS

	LAST FOUR DIGITS:	EXPIRATION DATE:
PRIMARY CARD		
SECONDARY CARD		
OTHER:		
OTHER:		

INSURANCE INFO

The types you have you'll need to share the details;
The types you might want make a note and revisit later.

- ❑ Health
- ❑ Life
- ❑ Disability
- ❑ Umbrella/Liability
- ❑ Car
- ❑ Property
- ❑ Long-Term Care
- ❑ Disaster
- ❑ Other: _____



Visit Everplans.com to learn more about the types of legal documents you need and how to safely store and share them with the people who will one day require access.

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MEDICAL DOCUMENTS, CONDITIONS & PRESCRIPTIONS

Have you completed any of the following Advance Health Care Directive(s)? If so, share where do you keep it.

- ❑ Advance Directive, which is a combination of you Living Will and naming a Health Care Proxy
- ❑ Do Not Resuscitate Orders (DNR)
- ❑ Physician Orders for Life-Sustaining Treatment (POLST)

Write out any medical issues you're currently managing and the methods of treatment.
For each condition including the following details:

- ❑ Name or Type of Medical Condition
- ❑ Required Treatment
- ❑ Prescription Required (medication name/doctor/pharmacy)

Make sure to identify any life saving medication or devices you need in case of an emergency:

❑ Inhaler ❑ EpiPen ❑ Insulin ❑ Other: _____

Don't forget any of the following items you may use to improve your vision, mobility, or quality of life:

- ❑ Glasses/Contacts (BD, DIA, SPH, Lenses type)
- ❑ Mobility Assistance (cane, walker, wheelchair)
- ❑ OTC Medication
- ❑ Orthopedic Devices
- ❑ Other: _____

PASSWORDS & DIGITAL ACCOUNTS

Identify all of the following devices and security you use and how someone you trust can access them.

❑ Mobile phone ❑ Computer(s) ❑ Wi-Fi ❑ Home Security

❑ Other (example: Tablet): _____

How do you currently keep track of your passwords?

❑ Password Manager ❑ Digital Document ❑ Physical Document

Here's an overview of the types of accounts to focus on to get you on the right path:

- ❑ Email
- ❑ Social Media
- ❑ Money Management
- ❑ Shopping
- ❑ Cloud Storage (Photos, Videos, Files)
- ❑ Messaging/Communication Tools
- ❑ Entertainment: Video | Music | Gaming
- ❑ Food/Delivery
- ❑ Other (Example: Travel, Web hosting/Blogging: _____

NOTES & PERSONAL THOUGHTS

Use this section for any additional information, personal thoughts, or anything you think is important for you to include.

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CREATE YOUR EVERPLAN NOW @ EVERPLANS.COM

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