

Identification Documents

- DRIVERS LICENSE
- SOCIAL SECURITY CARD
- PASSPORT
- MILITARY RECORDS
- RECENT PHOTO

Life Events

- BIRTH CERTIFICATES
- MARRIAGE LICENSES
- DEATH CERTIFICATES
- BIRTH/ADOPTION
CERTIFICATES FOR CHILDREN

Essential Documents

- WILL
- TRUSTS
- POWER OF ATTORNEY
 - MEDICAL
 - FINANCIAL
- INSTRUCTION LETTER
- BURIAL/FINAL WISHES

Banking

- BANK ACCOUNTS
 - ACCOUNT NUMBERS
 - PASSWORDS
 - LOG-IN INFO
- CREDIT CARDS
- SAFETY DEPOSIT BOXES

Insurance and Retirement (Pension)

- LIFE INSURANCE POLICIES
 - BENEFICIARIES
- PENSION DOCUMENTS
- ANNUITY PAPERWORK
- DETAILS OF STATE
PENSION ENTITLEMENTS
- DEATH-IN-SERVICE DOCUMENTS
- CANCER INSURANCE
- LONG TERM CARE
- HEART ATTACK/STROKE
- ACCIDENT INSURANCE
- MASA PLAN

Assets

- PROPERTY, LAND, CEMETERY DEEDS
- TIMESHARE OWNERSHIP
- STOCKS, IRA'S, 401K/403B
- BONDS
- CORPORATE OWNERSHIP

Liabilities

- MORTGAGE DETAILS
- REVERSE MORTGAGE
- TIMESHARES
- CARS
- PERSONAL LOANS
- HOME EQUITY LOANS

Household Expenses

- UTILITIES
- RENT/MORTGAGE
- INSURANCE
- LOANS
- MEMBERSHIPS
- SUBSCRIPTIONS

Email and Social Media

- EMAIL ACCOUNTS
 - PASSWORDS & LOG IN
- FACEBOOK/DATING SITES
- CELL PHONES
- STREAMING SERVICES
- COMPUTER PASSWORDS

Key Contacts

- DOCTOR
- LAWYER
- AMBA REPRESENTATIVE
- FINANCIAL ADVISOR
- INSURANCE BROKER
- ACCOUNTANT
- MINISTER
- NEXT OF KIN
- RETIREE CHAPTER/UNIT LEADER
- WORK OR SCHOOL



**REVIEW YOUR BENEFITS
TODAY BY CALLING 866.979.0494**