



VITAL INFORMATION

— CHECKLIST —

- ☐ Advance Health Care Directive + Health Care Agent
- ☐ HIPAA/CMA release for your health care agent
- ☐ Primary doctor name and contact information
- ☐ Health insurance policy (or Medicare) number and contact info
- ☐ Brief health history and a list of current medications being taken
- ☐ Allergies to any medications



Lifetime Planning

VITAL INFORMATION

— CHECKLIST —

☐

Social Security Number

☐

List of anyone who should be contacted and their phone numbers

☐

A Do Not Resuscitate (“DNR”) form

☐

File of Life fridge magnet

☐

Blood type

☐

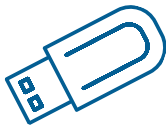
Date of birth



Lifetime Planning

NON-EMERGENCY

— ESTATE PLANNING — CHECKLIST



A “thumb drive” with a digital copy of your current estate planning documents such as your living trust, wills, and powers of attorney.



A list of “digital assets,” accounts, and passwords. Remember keep it updated routinely.



The location of your Vital Information Kit with your trusted successors. This will make it much easier for them to help.



Need help with putting this together or solidifying your estate plan. Contact us!

805-987-8938

Lifetime Planning & LPL Financial do not provide legal advice or services. Please consult your legal advisor regarding your specific situation.