

2025

Important Personal Information Check List

Name _____ Getting my house in order 2025.

At some time in your life you will be faced with some situations that will require your having knowledge of and/or access to certain important information to help address and/or resolve some unanticipated problems.

In such moments, how prepared are you to access that needed information?

The following checklist should help you confirm the status and location of such important Personal and Family Items, Documents, and Information.

Legal Documents

- | | | |
|---|---|---|
| <input type="checkbox"/> Birth Certificate | <input type="checkbox"/> Marriage License | <input type="checkbox"/> Driver's License |
| <input type="checkbox"/> Designated Executor | <input type="checkbox"/> Final Will & Testament | <input type="checkbox"/> Property Deeds |
| <input type="checkbox"/> Social Security Card | <input type="checkbox"/> Power of Attorney | <input type="checkbox"/> Adoption Papers |
| <input type="checkbox"/> Guardianship Documents | <input type="checkbox"/> Divorce Decree(s) | <input type="checkbox"/> Property Deeds |
| <input type="checkbox"/> Living Will | _____ | _____ |
| _____ | _____ | _____ |

Personal Information

- | | | |
|---|--|---|
| <input type="checkbox"/> Emergency Contact(s) | <input type="checkbox"/> List of Medications | <input type="checkbox"/> Physician(s) |
| <input type="checkbox"/> Personal Attorney(s) | <input type="checkbox"/> Final Instructions | <input type="checkbox"/> Cemetery Plot |
| <input type="checkbox"/> Pre-Need Arrangements | <input type="checkbox"/> Insurance Policies | <input type="checkbox"/> Military Records |
| <input type="checkbox"/> Biographical Information | <input type="checkbox"/> Family Heirlooms | <input type="checkbox"/> Family History |
| _____ | _____ | _____ |

Financial Information

- | | | |
|--|---|--|
| <input type="checkbox"/> Checking Account(s) | <input type="checkbox"/> Savings Account(s) | <input type="checkbox"/> Investments |
| <input type="checkbox"/> Credit Cards | <input type="checkbox"/> Outstanding Debts | <input type="checkbox"/> Creditors |
| <input type="checkbox"/> Employer Benefits | <input type="checkbox"/> Mortgage Documents | <input type="checkbox"/> Tax Information |
| _____ | _____ | _____ |

I am grateful and praise God for Rev. Samuel W. Hale Jr.
He is the author of, "When Your Loved One Dies."
Rev. Hale has prepared a helpful checklist for family planning.
This checklist is used by his permission.