

There is no “one size fits all” when it comes to creating a Life Plan Notebook.

Some of what your notebook might have includes:

- A **photo** for yourself
- **Social Security** number
- Identification (Photo of front and back of **Drivers License, passport**)
- Health Insurance Information (copies of front & back of all **prescription and medical insurance cards**)
- Current **Medications** List
- Names of **physicians** and other health care providers (dentists, hearing aid providers, eyeglasses, etc.)
- List of any assisted devices needed (**hearing aids, shoe inserts, glasses, etc.**)
- High-Level **Medical History** with notes on allergies
- Do Not Resuscitate (**DNR**) completed form
- Names and contact information of **key individuals** (Family Members/Friends/Clergy/etc.)
- Names and photos of all **pets**, names of veterinarians
- Power of Attorney and other **estate documents** such as wills, trusts, etc. with notes on the location of originals
- Long Term Care **Insurance** policy
- **Military** Service History
- **Key** to Home, details on alarm system
- Bank and Investment **accounts**
- Information regarding **loans to others**
- Information regarding outstanding **debts**
- List and location of **proof of ownership** for all real estate or land holdings, vehicles, stocks held in certificate, Savings Bonds
- **Safes**, Safe Deposit Boxes locations and how to access
- Homeowners and Auto **Insurance Carriers**
- Contact Information for **CPA**, Investment Advisor, Estate Attorney, Trust Company
- Summary of routine **bills**
- **Credit Cards**
- Details on sources of **income** and **investments**
- Pre-Paid **Burial** Arrangements
- **Views About Critical Care, Dying, and Death; Wishes, Values, Goals**