

Senior Downsizing & Moves

Vital Documents & Information

☐ **Will**

- Living Will
- Healthcare Directives
- Social Security Number
- Birth Certificate
- Drivers License

☐ **Living Trust Documents**

- Power of Attorney
- Fiduciary

☐ **Properties**

- List of Properties Owned
- Deeds

☐ **Financial Assets**

- Bank Accounts
- Credit Cards
- Investments
- Accounts on Auto-pay
- Insurance Policies
- Debts
- Tax Returns

☐ **Vehicles**

- RVs & Boat Titles
- Keys

☐ **End of Life Decisions**

- Burial & Funeral Arrangements
- Plots Purchased

☐ **Emergency/Important Contacts**

- Family, Friends, Medical & Legal
- Name
- Phone
- Email
- Address Book

☐ **Pets**

- Vaccinations
- Veterinarian

☐ **Guns**

- Location of Guns Loaded/Unloaded

☐ **Keys**

- Properties
- Storage Units
- Safe Deposits
- Safe Combinations
- Items of Value

☐ **Important Documents**

- List Location

☐ **Websites and Passwords**

- Medical Information
- Social Media Accounts
- Financial Accounts
- Email Passwords