



Household Account Checklist

If a loss of a loved one occurred today, would you be able to locate the needed financial accounts, insurance information, assets, websites, logins and passwords required to deal with their estate? If your records were lost due to any of the natural disasters happening around us, would you be able to remember and reconstruct everything you have? Having a record of this information is crucial for you and your loved ones. It is your peace of mind. It is your life. From how you pay your bills, to accessing your personal information to where you shop. Recording the details of your life is crucial. This checklist is meant to help you do that.

While this is not a complete listing, use this checklist as your guide to help you consider the items and information that should be recorded.

Financial Accounts	Institution	Website & Login Information	Notes
<ul style="list-style-type: none">• Checking and savings accounts• Money market accounts• Certificate of Deposit (CD)• ATM/Debit card• Safe deposit box• Retirement accounts (401(k), 403(b), IRA, Pension)• Investments (Stocks, bonds, annuities, college savings plan)• Home Equity Line of Credit (HELOC)			
Credit Cards	Institution	Website & Login Information	Notes
<ul style="list-style-type: none">• Visa, MasterCard, American Express, Discover• Retail cards (Target, Macy's, Lowe's)			
Insurance Information	Company Name / Insured	Website & Login Information	Notes
<ul style="list-style-type: none">• Health Insurance (include current medications and prescribing physician)• Dental or Vision insurance• Life insurance• Disability insurance			

Household Account Checklist

<ul style="list-style-type: none"> • Other health related insurances (Long Term Care insurance, Medicare Supplement or Critical Illness policies) • Automobile insurance • Recreational vehicle insurance (RV, motorcycle, boat) • Homeowners or Renters insurance • Flood or other specialty insurances 			
Estate Planning Documents	Advisor	Location of Original Document	Notes
<ul style="list-style-type: none"> • Will (original) • Trust planning document • Advance Directives/Living Will • Special Needs Trust Documents • Power of Attorney documentation 			
Important Documents	Type	Location of Original Document	Notes
<ul style="list-style-type: none"> • Deeds and Titles (land, property, mortgage, auto and other vehicles) • Driver's License Number and issuing state • Other personal identification number (State issued I.D., Visa, Passport, Green Card) • Marriage and/or divorce papers • Birth certificates, adoption papers • Military service or Veteran's affairs numbers • Tax Returns 			
Subscriptions	Name / Organization	Website & Login Information	Notes
<ul style="list-style-type: none"> • Newspaper(s) • Periodicals • Other subscriptions (AARP, AAA) • Identity theft plans • Netflix 			

Household Account Checklist

<ul style="list-style-type: none"> Meal service plans (Blue Apron) Reward programs (hotel rewards, frequent flyer, retail rewards) 			
Memberships	Institution	Website & Login Information	Notes
<ul style="list-style-type: none"> Gym membership Amazon Prime Retail (Costco, Sam's Club) Charity Organizations (Elks, Lions) Other Associations 			
Utilities	Company Name / Type	Website & Login Information	Notes
<ul style="list-style-type: none"> Gas & Electric Phone (Land line and Cellular) Cable Internet provider Water & Sewer Garbage / Recycle collection 			
Government Benefits	Type / Benefit amount	Website & Login Information	Notes
<ul style="list-style-type: none"> Social Security, SSDI Medicare, Medicaid VA Benefits Retirement Benefits 			
On-line Accounts	Type / Company / Name	Website & Login Information	Notes
<ul style="list-style-type: none"> Email: (Gmail, Hotmail, Yahoo, AOL) Social: (Facebook, Twitter, Instagram, Pinterest, Reddit, Snapchat) Career: (LinkedIn, Monster, About, Tumblr, WordPress) Communication: (Verizon, AT&T, Viber, Skype) Media: (Pandora, Spotify, iTunes, Dropbox, Google Drive, Netflix, Hulu) 			

Household Account Checklist

<ul style="list-style-type: none">• Necessities: (Amazon, Walgreens, eBay, Target, Online Grocers)• Bills: (Mint, PayPal)• Travel: (Uber, Hotels.com, Hotwire, Orbitz)• Dating Life: (eHarmony, Plenty of Fish, Tinder)• Entertainment: (Groupon, Grubhub, Stubhub, Ticketmaster)			
---	--	--	--

Keep this checklist somewhere safe (safe deposit box, or with a trusted family member or Advisor. Or store it in the cloud where it can be accessible in the event of an emergency.)