

SCHEDULE TIME WITH
YOUR DEDICATED
EDUCATIONAL
RESOURCE HERE:

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LEGACY BOX CHECKLIST

CREATE A “LEGACY BOX”

A Legacy Box is a great way to keep all your important information in one place! Take time to ensure everything you need is in the box and update it regularly. We’ve included a suggested checklist of documents to maintain in the Legacy Box.

- o Will and Estate Plans (make sure documents are “in force”)
- o Financial Account Information
 - Include Account Names, Numbers and Account Balances,
- o Important Contact Information
 - Financial Advisor: _____
 - Estate Attorney: _____
 - Primary Doctor: _____
 - Emergency Contact: _____
 - Power of Attorney: _____
- o Funeral Instructions
- o Medical information
 - Include providers, medications, blood type, vaccination record, health conditions, surgeries, hospitalizations, allergies, and family medical history
- o Insurance Policy Numbers and Account Holders
 - Car _____
 - Medical _____
 - Life _____
 - Type _____
 - Amount _____
 - Beneficiary _____
 - Disability _____
 - Long Term Care _____
 - Other _____
- o Important Documents
 - Include Deeds, Titles, Marriage and Birth Certificates, Social Security Cards & Passports
- o Past Tax Returns
- o Monthly Budget
- o Debts & Bills Owed
- o Passwords
 - Include all passwords, pins, and combinations, security questions
- o List of Personal Belongings and Where to Find Them
- o Letters to Loved Ones