



MARGOLIS
BLOOM &
D'AGOSTINO

Your future. Handled with care.

Create your binder:

Medical

- ☐ Personal & family medical history
- ☐ List of providers
- ☐ Medication list
- ☐ Health care proxy
- ☐ Medical directives
- ☐ Health insurance details
- ☐ Medicare/Medicare supplement details
- ☐ Long-term care insurance details

Personal

Date of birth _____

Retirement date _____

Full name of parents _____

City and state of birth _____

Maiden name and/or other names used

Important email addresses _____

- ☐ Copy of Social Security card
- ☐ Important online account details
- ☐ Copy of marriage license or divorce papers
- ☐ Copy of birth certificate

Estate Plan

- ☐ List of valuable personal property (and appraisals)
- ☐ Will
- ☐ Trust(s)
- ☐ Power of attorney
- ☐ Copies of deeds
- ☐ Title insurance details
- ☐ Safe deposit box information, including location of key
- ☐ Combination for home safe,
- ☐ Funeral/burial/cremation wishes
- ☐ Contact information for estate planning attorney

Financial

- ☐ List of bank accounts/investment accounts
- ☐ Pension/annuity documents
- ☐ Mortgage details & contracts
- ☐ Details of any other loans or debts
- ☐ Vehicle titles
- ☐ Corporate/partnership documents (operating agreements, etc.)
- ☐ Tax returns (most recent 3 years)
- ☐ Gift tax returns
- ☐ Important annual bills (for example insurance premiums)
- ☐ Homeowners and care insurance details
- ☐ Life insurance policies
- ☐ Retirement accounts & beneficiary information
- ☐ Name and contact information for accountant and/or financial advisor