

LIFE

IN

MOTION

A GUIDE

FOR GATHERING LIFE'S
VITAL INFORMATION

KAREN PURZE



Personal Document Inventory

	Have	Need	Don't Need	Location
Passwords	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Social Security Card	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Drivers License	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Insurance Cards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Birth Certificate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Pre-Nuptial Agreement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Marriage Certificate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Domestic Partnership Registration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Life Insurance Policy / Policies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
DNR Order	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Living Will	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Healthcare Power of Attorney	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Designation of Guardian	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Uniform donor card	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Passport	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Naturalization papers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Adoption Papers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Divorce Decree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Military Service Record (DD 214)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Copyrights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Patents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Trademarks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____



Household and Property Document Inventory

	Have	Need	Don't Need	Location
Property Deed(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Mortgage(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Reverse Mortgage(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Appraisal(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Timeshare agreement(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Homeowner's Insurance Policy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Renter's Insurance Policy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Condo or association by-laws	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Senior living community contracts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Vehicle Title(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Vehicle Insurance Policies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Warranties	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Leases	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Bankruptcy filings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Pet Vaccination record	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Pet Registration record	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____

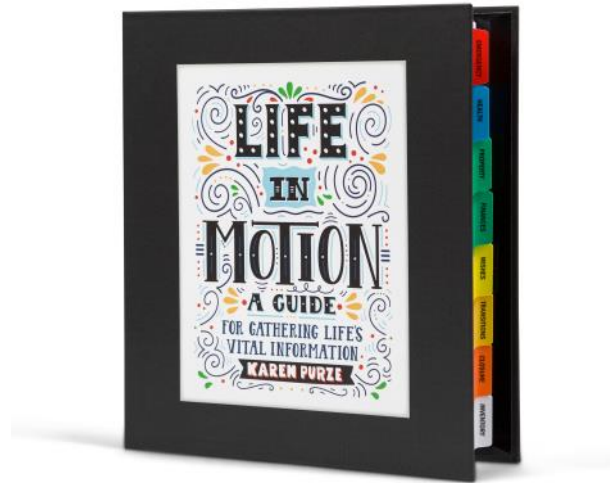


Financial and Estate Document Inventory

	Have	Need	Don't Need	Location
Power of Attorney	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Pre-arranged funeral agreement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Pre-paid cremation agreement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Obituary	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Will	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Codicil(s) ¹	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Trust agreement(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Checkbook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Income Tax returns (last 3 years)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Gift Tax Returns (last 3 years)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Savings Bonds	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Business agreements and contracts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Business licenses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Stock Certificates	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Royalty agreements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____

¹ A codicil is an addition or supplement that explains, modifies, or revokes a will (or part of one)

LIKE WHAT YOU SEE? GET THE WHOLE GUIDE.



Life in Motion is a guided workbook to help you get personal information organized so it's ready when you or your family need it.

It has all the forms, checklists, and document inventory sheets you need to quickly record your most important personal information:

- ◆ Emergency Plans
- ◆ Personal Health Record
- ◆ Property Information
- ◆ Financial Assets (and Liabilities)
- ◆ Final Wishes

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