



Vital Documents Checklist

Inventory the documents you or your loved one have prepared and note where these documents are stored. Scanned documents can be uploaded to **torchlight File Cabinet**, where any member of your care team who has permission can access them as needed.

Five Essential Legal Documents

Completed	Document	Location
	Durable Power of Attorney (POA)	
	HIPAA Release Form	
	Health Care Proxy	
	Living will or advance directive	
	Will	

Additional Documents

Completed	Document	Location
	List of bank accounts	
	Pension or retirement account information, annuity contracts	
	Savings bonds, stock certificates, brokerage accounts	
	Deeds to property	
	Vehicle title	
	Loan documents (including mortgages)	
	Credit cards	
	Safe deposit boxes and location of keys	
	Home owner's insurance documents	
	Life insurance documents	
	Long-term care insurance documents	

	Employer-based insurance documents, such as long- or short-term disability	
	Divorce papers	
	Military records	

Additional Information

Completed	Document	Location
	List of user names and passwords	
	Social Media user name and password and wishes for social media presence after death	
	Club memberships	
	Items hidden in the house or apartment	
	Items on loan to others or needing return to others	
	Personal debts owed or owing	
	PO Boxes or other mailing addresses	
	Alarm Codes	
	Subscriptions	
	Other _____	
	Other _____	
	Other _____	