

Ritchie Law Office, Ltd. - "The Everything Book"

Module 1: Your Family and Friends - Your Story/Family History/Advisors/Friends

1	Biographical Data, Your Life Story ; Family History; Resume
2	Birth Certificate; Marriage Certificate; Passport; Adoption; Immigration; Divorce; Prenup Agreement
3	Club Memberships; Military Records; Discharge Papers; Veterans Benefits
4	Airline Miles; Credit Card Rewards; Vouchers; Gift Certificates
5	Personal Advisor List: Pastor; Attorney; Tax Advisor; Financial Advisor; Banker; Hairstylist
6	Family and Friends Contact Information

Module 2: Your Health and Well-Being - Medical Information

7	Medications, Dosage, and Pharmacy Used
8	Medical History, Allergies and List of All Physicians/Care Providers
9	Health Insurance; Medicare Supplement Insurance; Long Term Care (Nursing Home) Insurance
10	Health-Related Online Portals: Websites; Login; Passwords
11	HealthCare Power of Attorney (Extra Copies)

Module 3: Your "Stuff" - Vehicles/Tangible Property/Family Heirlooms/Digital Assets

12	Vehicles: Copies of Titles; Insurance; Maintenance Records
13	Family Heirloom Notes; Artwork; Jewelry; General Household Inventory
14	Extra Keys: Car; Home; Boat; Office; Firesafe; Safety Deposit Box Location and Contents
15	Pet Records; Veterinarian Records; Instructions for Pet Care
16	Digital Assets: Online Passwords; Social Media Sites; Online Photo and Doc Storage; Cell Phone Unlock

Module 4 : Your Home - Home/Real Estate Information

17	Copy of Deeds; TODI ; Real Estate Tax Statement; Leases; Time Share Documentation
18	Homeowner's Insurance Policy; Real Estate Tax Records
19	Home Improvement Records; Appliance Warranties
20	Home Vendor List: Lawn Care; Cleaning; Pool; Preferred Contractors - Plumbing; Electrical, Etc.
21	Home Utilities Information and Records

Module 5: Your Finances - Bank Accounts/Financial Investments/Life Insurance/Debts/Taxes

22	Bank Account Information: Checking; Savings, Money Market, Certificates of Deposit; Crypto Currency
23	Investments: Retirement Accounts: 401K; 403b; Trad IRA; Roth IRA; Non-Retirement Accounts
24	Life Insurance Policies or Illustrations: Term; Universal; Whole; Group
25	Benefits: Pension, Social Security, Disability Insurance, Veterans Benefits
26	Debt Obligations and Lines of Credit: Mortgages, Loans, Credit Cards, Other Debt
27	Federal and State Income Tax Returns
28	Power of Attorney for Property (Extra Copies)

Module 6: Your Legacy - Ritchie Law Office, Ltd. - Estate Planning Documents

29	Probate Asset Analysis Diagram™; Estate Planning Diagram
30	Beneficiary Designation Checklist Worksheet; TODI
31	Will; Trust; List of Assets Held by Trust (if applicable)
32	Power of Attorney for Property
33	Power of Attorney for Healthcare
34	Healthcare Directives; DNR; Organ Donation Wishes
35	Funeral Arrangements; Cemetery Deed; Plot Site; Cremation Instructions
36	Obituary; Letters to Family; Memoirs; Death Certificates

Create Additional Tabs as Needed For Dependents, Businesses or other Customized Purposes

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