



IMPORTANT DOCUMENTS YOU NEED

The main purpose of Heartfelt Celebrations is to provide you with simple, thorough, step-by-step processes that walk you through all the necessary areas that need to be addressed in order to be fully prepared for end of life. Having your important information organized and in a pre-determined location – on our website, in another secured area, or both – will not only make it easy for you if you need to access it, but it will also be helpful for your loved ones during a time of illness, aging or death.

For “Your Key Documents,” having your written instructions that specify what actions should be taken regarding your health, finances, insurance, and other important areas of your life if you are no longer able to make decisions will not only give you peace of mind, they will help your family during that very trying time, knowing they are carrying out your specific wishes. It also helps your loved ones when determining the important people who should be notified in case of your death, and it will help them to remember important things in your life that could be mentioned or included in your celebration-of-life plan.

Heartfelt Celebrations is here to help you do all of this! Here is a list of the documents we believe help create a well-defined plan.

Health Care Information

- Advance Directives (health care directive or living will)
- Durable Power of Attorney for Health Care (“Five Wishes” document)
- Medical Records
- A Consent to Treat (for your children)
- Authorization to Release Health Care Information (“Do Not Resuscitate” or DNR)

Financial Documents

- Checking Accounts
- Savings Accounts
- Certificates of Deposit
- Savings Bonds
- Stock Certificates
- Safe Deposit Boxes Location and Keys
- Escrow Accounts
- List of Bills, Account Information, Date Due, and Amount Usually Paid
- List of Loans, Loan Papers and/or Account Numbers, Amount and Date Due
- Credit Card Information
- Financial Power of Attorney

Deeds, Titles, etc.

- House Deeds and Titles
- Land Titles
- Vehicle Titles
- Business or Incorporation Papers
- Business Operating Agreements
- Proof of Loans Made
- Tax Returns

Insurance

- Medical Insurance Cards
- Life Insurance Policies
- Mortgage or Loan Insurance
- Auto (and other vehicle) Insurance
- Insurance Provided by Employer(s)
- Any Other Insurance

Retirement and Investments

- Investment Broker/Firm you use and Account Information
- 401(k) or other similar account information
- Stock Certificates or Bonds
- Individual Retirement Accounts (IRA or Roth IRA)
- Certificates of Deposit
- Savings Bonds
- Pension Information
- Annuity Contracts



**“I think the more you celebrate your life,
the more there is in life to celebrate...”**

Certificates, Licenses, Military Papers, etc.

- Birth Certificates
- Marriage License(s)
- Divorce Decree or Separation Papers
- Death Certificate(s) of Other Relatives
- Social Security Number
- Driver's License
- Honorable (or other than Dishonorable) Discharge Papers
- Professional Memberships (professional associations, unions)
- Social Service Membership (Rotary, Kiwanis, Lions, Veterans Clubs)
- Miscellaneous Memberships (grocery, warehouse club, auto, alumni, health, library, etc.)
- School Information (either your own or your children's schools)
- Service Companies (for home, property or vehicles)
- User IDs and Passwords

Wills and Trusts

- Will
- Trusts
- Ethical Will

Every person's circumstances are different, so it's always a good idea to consult with your attorney to make sure the documents are filled out in accordance with your personal situation and location.

