The Legacy File Checklist

The Legacy File is where you will keep all of your End-of-Life, and other important documents. These documents and information, will provide instructions to your family if anything where to happen to you.

- [ ] A **Summary Sheet** of everything in the file. It should include how and when to use each document.
- [ ] A list of all your **Financial Accounts**. Include loans, deposits, and investmnetes. Include financial institutions, passwords, and account titles.
- [ ] Your **Will and Estate** documents, that includes health care directvies and power of attorneys.
- [ ] List your **Insurance Policies**. This includes health, life, car home, etc. Policy numbers, names of insured and the beneficiaries, and contact info for your insurance agent.
- [ ] Monthly and Annual **Budget**. List all your income, expenses, and how each bill get's paid. Amount and frequency.
- [ ] Keep a copy of your **Tax Returns** in your file. Business and Personal if you are self-employed.
- [ ] Other **Important documents** like titles to vehicles, deeds, birth certificates, marriage certificates and other sacramental certificates, or other important documents.
- [ ] **Burial and Funeral instructions** and information. This could include cemetary plot, and scripture readings desired for a funeral Mass.
- [ ] **Email, social, and other online account** usernames, passwords, pins, and security question answers.
- [ ] **Letters or anything else**. If you have letters, or honorings you want to leave your loved ones, place them in here. If there is anything else you want to leave, place it in here with instuctions.
- [ ] **Location of your duplicate file**. You should have a duplicate file of all of this information. List the location here. If it is a safe deposit box, provide the access instructions. If it is a file in another location, reference it here.

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