



Outline for Personal Records Notebook January 2024

1. Personal Instructions/Letters to Family
2. Identification
3. Contacts
4. Health Records
5. Legal Documents
6. Funeral Arrangements
7. Pets
8. Safe Deposit Box and Key Location
9. Personal Balance Sheet
10. Details on Assets
11. Details on Liabilities
12. Income: Pension, Social Security
13. Debts/Monthly Payments
14. Insurance: Life, Property, Car, Disability, and/or Long Term Care
15. Most Recent Tax Returns (Federal and State)
16. Social Media and Other Website Accounts

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