



Silver Path Consulting

Essential Information Checklist

A simple way to organize what matters most.

Legal Documents

- Will
- Trust documents *(if applicable)*
- Power of attorney — financial
- Power of attorney — healthcare
- Advance directive / living will
- POLST *(if applicable)*

Financial Records

- Bank accounts
- Investment / brokerage accounts
- Retirement accounts
- Insurance policies
- Property / vehicle titles
- Safe deposit box
- Outstanding debts / liabilities
- Trusted advisor contacts

Healthcare Information

- Primary care physician
- Specialists + contact info
- Medications + dosages
- Medical history summary
- Insurance cards / Medicare
- Pharmacy

Identity & Personal Documents

- Social Security card
- Passport
- Birth certificate
- Marriage / divorce certificates
- Military / naturalization records

Household & Practical Essentials

- Utility accounts
- Recurring subscriptions
- Home / security system info
- Digital passwords
- Email account
- Smart Phone access
- Advisor contacts

Wishes & Legacy

- Funeral / burial preferences
- Organ donation decision
- Sentimental belongings guidance
- Letter of instruction

For each item, note: where it's located, how to access it, and who knows where to find it.