**Document Work Sheet**

* Key information you have, need to update or want to start on in the next year.

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| 1. **MEDICAL INFORMATION** | **Location** | **Who Needs** |
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| 1. **BANKING AND FINANCIAL INFORMATION** |  |  |
| * 1. Safe deposit box? |  |  |
| * 1. INCOME SOURCES |  |  |
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| * 1. ASSETS |  |  |
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| * 1. DEBT |  |  |
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| * 1. EXPENSES |  |  |
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| 1. **PEOPLE LISTS** |  |  |
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| 1. **IDENTIFICATION & DEATH CERTIFICATE** |  |  |
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| 1. **LEGAL DOCUMENTS** |  |  |
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| 1. **DIGITAL- LOGINS** |  |  |
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