**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**
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| * 1. Safe deposit box?
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| * 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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