My Life Book

Where my important things are, who to call, and what I want

This book belongs to:

_____

Started: _____ **Last updated:** _____ **Next review:** _____

THIS BOOK DOES NOT REPLACE YOUR WILL, TRUST, POWER OF ATTORNEY, OR HEALTH CARE DIRECTIVE. Nothing written here changes your legal documents, beneficiary forms, or who owns your property. It tells your family where those papers are and what you want them to know.

Before you start, please know:

- **One book per person.** Nobody shares a book. **You control who sees it.** Decide now who can get to it in an emergency.
- **It's a map, not a safe.** Write down *where* things are, not the things themselves.
- **Never write in it:** passwords, PINs, Social Security numbers, birth dates, bank or card numbers, security answers, or recovery codes.
- **Not only in a safe-deposit box.** A bank can seal or slow access to a box when someone passes away or can't act.
- **Fill in what you can.** Blank spaces are fine. You can add more anytime.
- **Want help?** Anyone in the family can sit with you, and your own attorney is welcome to look it over.

Where I keep this book:

☐ Fireproof safe at home ☐ With my attorney ☐ Other: _____

The one person who knows where it is: _____
Their phone: _____

1. Who to Call

The people who should hear first, and the helpers who know my business.

Who	Name	Phone	Notes
My trusted person			
Backup trusted person			
Doctor			
Attorney			
Accountant / tax preparer			
Insurance agent			
Bank contact			
Pastor / faith leader			
Neighbor with a key			
Other			
Other			

2. My Health

So a doctor or family member can help me fast.

Item	Details
My doctors and their phone numbers	
Medicines I take (name and dose)	
Allergies	
Health insurance / Medicare / Medi-Cal (plan name only)	
Pharmacy	
Hospital I prefer	
Where my insurance cards are	

3. Where My Papers Are

Check if you have it and write where it's kept. You don't need to show anyone the papers.

Paper	Have it?	Where it's kept
Will	☐ Yes ☐ No	
Trust	☐ Yes ☐ No	
Power of attorney for money	☐ Yes ☐ No	
Health care directive (who speaks for me)	☐ Yes ☐ No	
Deeds to property	☐ Yes ☐ No	
Car titles	☐ Yes ☐ No	
Life insurance policies	☐ Yes ☐ No	
Birth and marriage certificates	☐ Yes ☐ No	
Death certificate of my spouse (if any)	☐ Yes ☐ No	
Military / DD-214 (if any)	☐ Yes ☐ No	
Social Security card and Medicare card	☐ Yes ☐ No	
Tax returns (last 3 years)	☐ Yes ☐ No	
Funeral or burial plot papers	☐ Yes ☐ No	

If something is missing, like a will or a health care directive, your own attorney can help you make one.

4. Money and Property

Names of banks and companies only. No account numbers.

What	Bank or company	Who else is on it?	Contact
Checking			
Savings			
Retirement / pension			
Social Security deposit			
Bills paid automatically			
Money owed to me			
Money I owe			

Property	Address or description	Who helps manage it

5. My Phone and Online Accounts

*Write **where** the passwords are kept (a sealed envelope in the safe, or a password app), never the passwords.*

My phone and computer passcodes are kept:

Online accounts I use (email, bank apps, social media):

What should happen to my social media accounts?

6. My Wishes

In my own words, so my family never has to guess.

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If I needed help every day, I would want:

☐ Family ☐ A hired caregiver ☐ Both

Where I want to be cared for:

When my time comes, I want:

☐ Burial ☐ Cremation ☐ Not sure yet

My service (church, music, readings, who speaks):

Special things I want to go to special people:

To make this binding, it also needs to be in your will or trust.

Letters I have written, and where they are:

What I want my family to remember:

Professional Review Needed

Questions this book can't answer. Write them down and take them to the right professional.

Who to ask	My question	Asked on
Estate attorney (will, trust, power of attorney)		
Accountant / tax professional		
Financial advisor		
Insurance agent		
Real estate or property attorney		
Doctor / care manager		
Other		

7. My Yearly Check-Up

Once a year, in your birthday month, look it over and update anything that changed.

Date	What I changed	Initials

Keep it safe. Put this book back in its safe place when you finish. Tell your trusted person if you move it.

Only one current copy. After each review, replace any copies you gave out (for example, to your attorney) and mark or shred the old ones. Write the review date on the cover.

Your book, your say. We just want to make sure no one is ever left guessing.