## Living in the Present, Planning for the Future

## The Victory Summit® Virtual Event Our Voices, Our Stories April 2022

## **Amy Montemarano**

•	W	ill	&	Tru	st

- · Date:
- Who Prepared it:
- · Hard copy with original signatures is located here:
- · Other copies are located here:

## Medical Advance Directives

- Date:
- Who Prepared it:
- · Hard copy with original signatures is located here:
- · Other copies are located here:
- Identity Documents (birth, marriage, adoption, divorce, passport, Social Security, driver's license, public benefits)

Document	Located Here

• Insurance Documents (life, medical, disability, real property, long-term care, automobile)

Document	Located Here	Company	Contact

•	<b>Employment</b>	(employment	contract, pay stu	ıbs, human resources contact)
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• Medical Records (doctors, online patient websites, hard copy records)

Assets & Liabilities (real property deeds, mortgages and mortgage notes, lease housing contracts, checking and savings bank accounts, investment and brokerage accounts, credit cards, loan documents, tax returns)		

User Names & Passwords	S
<b>Emergency Contacts</b>	
Personal Instructions (fina	al wishes, your stuff, ethical will)
Document	Located Here