

Living in the Present, Planning for the Future

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

Amy Montemarano

- **Will & Trust**
 - 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)

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

| Document | Located Here | Company | Contact |
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- **Employment** (employment contract, pay stubs, human resources contact)

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- **Medical Records** (doctors, online patient websites, hard copy records)

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- **User Names & Passwords**

- **Emergency Contacts**

- **Personal Instructions** (final wishes, your stuff, ethical will)

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