

# How to create a Table of Contents - for your most important documents

To start the project:

- Supplies needed, a pencil, a binder, an erasable table of contents packet with 31 tabs ([see link](#))

To insure the project works:

- Write it down
- Have the conversation
- Visit the binder annually and change as needed

## Suggestions for “Table of Contents for Binder”

- 1) How do we identify you? Copies of identification, driver’s license, social security card, passports and citizenship papers.
- 2) What is in your wallet? Photocopy contents of your wallet including credit cards front and back for loss or theft. Phone number for theft reporting is on back of credit card.
- 3) Who do we call? Names, phone numbers and addresses of key people
- 4) Where are the keys? Location of Master set of all keys specifically labeled.
- 5) What is your current medical picture? List of doctors and RX information, and allergy information
- 6) Health Insurance Information – including policy number
- 7) Social Security and Medicare Information
- 8) Supplemental Insurance if Medicare is primary insurance
- 9) Where are your important papers? Inventory of safe deposit box or cloud file
- 10) Copy of current Will
- 11) Copy of current Trust Agreement with Amendments
- 12) Copy of current Power of Attorney for Financial matters
- 13) Copy of Advance Health Care Directive
- 14) Copy of HIPPA or POLST documents – if applicable
- 15) Copy of Living Will – if applicable
- 16) Long Term Care Insurance information - if applicable
- 17) Life Insurance information – if applicable
- 18) Pension/retirement plan information
- 19) House Insurance – copy of Declaration page
- 20) Car Insurance – copy of Declaration page
- 21) Umbrella Insurance – copy of Declaration page
- 22) Checking account(s) – copy of recent bank statement
- 23) Savings account(s) – copy of recent bank statement
- 24) Investment account(s) – copy of recent investment statement
- 25) Mortgage or loan information – copy of recent statement
- 26) Copy of deeds and titles for real property, vehicles and other assets
- 27) Loans to family members or friends and gift wishes
- 28) Location of address book or information for family and friends
- 29) Location of password for online activities
- 30) Evacuation - List of steps