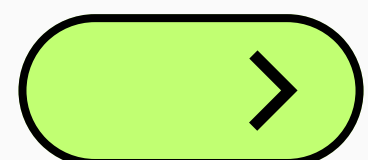


NAVIGATING AGE WITH CONFIDENCE

Plan Today, Protect Tomorrow

Organizing Documents and Personal
Information


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01

Plan ahead, Maintain

- ✓ Independence
- ✓ Security
- ✓ Peace of mind



02

Key Areas to Organize

 Legal documents

 Professional contacts

 Financial information



03

Essential Legal Documents



Will



Revocable Living Trust (if applicable)



Durable Power of Attorney (Financial)



Health Care Proxy / Advance Directive



HIPAA Authorization & Beneficiary

Designations



POLST (if appropriate)



04

Professionals & Financial Info

Keep a list of key contacts:



Medical providers



Lawyers



Accountants & financial advisors

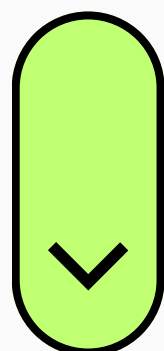
Organize financial info: assets, debts, accounts, and logins to ensure smooth decision-making.





It's not enough to
execute documents

it's essential to...

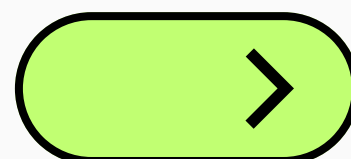


Secure & Share

 Store everything securely in one central place

 Make sure appropriate people know where to find it

 Review regularly



NAVIGATING AGING WITH CONFIDENCE



Share to Spread the Power of Proactive Planning


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