



## SHAREDTRUST.APP

These are the types of personal and business records you need to keep a record of in case you are missing, in an accident and disabled (where you can no longer manage your affairs) or are deceased.

### Personal Messages

- Burial requests (e.g., specific cemetery, cremation, organ donation, scientific research).
- Special notes for friends and family.
- Confessions

### Important Contacts

- Who has financial and medical power of attorney?
- The Full name, Contact Info, ID, Passport and Tax number, Marriage information, or any other applicable information for yourself, spouse, parents, children, business partners and other parties.
- The contact details of your Religious Leader, Accountant, Attorney, Banker, Insurance Broker, Executor, Mentor, Adviser, Employer and Close Friends with any special requests or arrangements already made with these contacts.

### Personal Medical

- Health Conditions, Allergies, Physician(s), Medications, Pharmacy (with medication script), Medical History, Dietary Restrictions

### Policies

- Health/Life/Disability/Funeral/Vehicle/Home/Travel/Legal/Freight/Commercial Insurance policies.
- Key man business policies and buy/sell agreements for the business.

### Passwords

- Social media / Email / Web hosting account, Laptop and Cell phone lock-screen details
- **Note: DO NOT** use the Shared Trust app to store your bank account passwords, as this may be a violation of the Terms and Agreement that you have agreed to with your financial services provider. If you need a Trusted Party to have access to your bank accounts, speak to your financial institution about nominating your Trusted Party as your Power of Attorney.

### Banks Accounts & Investments

- List of financial institutions and your account numbers (do not store any banking or investment account passwords)

### Property

- List of residential, commercial and storage properties owned or rented.
- Location of your postal mailbox and safe custody box
- Utility details (e.g. electricity, rates, levies, phone, water, security provider's account number and contacts).

### Other Valuables

- Location of the original or certified documents – your Last Will and Testament, ID, Passport, Marriage Certificate, Safety Deposit Box, Tax documents, Signed Sureties, Vehicle Registration and Logbook.
- Loyalty programs (e.g. flights, hotels, stores) – with account details
- Vouchers and Gift Cards
- List of assets and liabilities.
- Valuables such as Jewels, Art, Collectibles, Furnishings, Electronics, Vehicles