



TOPIC 2 | MY IMPORTANT DOCUMENTS

CHECK MY PROGRESS

Completed	Description	Reference
<input type="checkbox"/>	I have reviewed the My Important Documents list and have filed those documents; I have identified missing documents that I need to find or request and I understand how to do this	Pg. 26-28
<input type="checkbox"/>	I have a filing system	Pg. 29-30
<input type="checkbox"/>	I have purged my files and shredded old and unnecessary documents	-
<input type="checkbox"/>	I have a plan for my original and copies of important legal documents (like a home safe or safe deposit box)	-
<input type="checkbox"/>	I have opened all unopened mail and filed important papers; I have created a stack of letters or papers I don't understand	Pg. 31-34
<input type="checkbox"/>	I have collected all my current bills into another stack	Pg. 31-34
<input type="checkbox"/>	If I have past due bills, I've collected them into yet another stack; I have contacted these creditors to work out a payment schedule	Pg. 31-34
<input type="checkbox"/>	I know my passwords; they are safe, and someone I trust can access them in the event of my incapacity	Pg. 35
<input type="checkbox"/>	I know my spouse's passwords and can access his online accounts	Pg. 35
<input type="checkbox"/>	I have access to my spouse's email and smartphone; I continue to monitor both for important communications	Pg. 35

BEFORE YOUR NEXT SESSION

1. Review the next session—Get Prioritized.
2. Complete as many activities as possible.

