

# Life Planning Notebook

## ∅ Emergency Contacts/ Temporary Instructions

- Clear Instructions (Administer medicine, call sister, call caseworker, etc.)
- Parents, Guardians, Relatives

## ∅ Medical Information

- Common Medical Issues
- Key Medical Reports and Diagnoses
- Medications and Reasons For
- Doctors, Therapists, Pharmacies

## ∅ Family Information

- Family Tree
- Family Contacts
- Pictures

## ∅ Legal/Financial Information

- Location of Original Documents
- Letter of Intent
- Will
- Trusts
- Durable Power of Attorney
- SS Card, Medicaid/Medicare Card, Health Insurance Card
- Birth Certificate
- Life Insurance Policies
- Investment Accounts
- Financial Advisor Information

## ∅ Educational/Employment Information

- Teachers, Principals, School Contacts
- School Schedule
- Summary of Education Plan
- Employment History
- Evaluations
- References