

Trustworthy.

Essential Life Details with Trustworthy

Hello from Trustworthy! Are you wondering, where will I start?

Sometimes a good old fashioned checklist is just what we need to get started on a new habit in life. With that in mind, we've corralled all of the most common bits of life information that Trustworthy members like to add first to their new Trustworthy accounts.

Ahead of your meeting with your Trustworthy Certified Expert™, gather these docs (digital or physical). You might even add a few to your account before the meeting to experiment and familiarize yourself with Trustworthy.

[Add an Emergency Contact](#) to your account, and share Trustworthy with your contact

Family IDs

- Driver's license
- Passport
- Social Security card
- Vaccine card
- Birth certificate
- Other IDs
 - Military
 - AAA membership
 - AARP membership
 - Gym membership
 - Rewards clubs, etc.

Finance

- Bank accounts
- Mortgages
- Credit cards
- Investment accounts
- Loans
- Other

Property

- Primary home
- Investment property

Trustworthy.

- Vehicles
- Electronics
- Jewelry
- Artwork
- Heirlooms

Passwords

- Password managers
- Garage door code
- Code to safe
- Laptop password
- Home WiFi password
- Phone password

Insurance

- Life insurance
- Medical insurance
- Eye insurance
- Dental insurance
- Auto insurance
- Homeowners insurance

Taxes

- Tax returns

Legal

- Wills/living trusts
- Power of attorney
- Medical directives

Business

- Any documents related to a business you own

Family Resources

- Important docs
 - Evacuation plan
 - Babysitter instructions
- Emergency equipment
- Letters to loved ones

Contacts

- Advisors

Trustworthy.

Home services companies

[Please read about how important security is to us](#)

[Please explore our blog for additional resources and information](#)

Schedule quarterly sessions with your Trustworthy Certified Expert (TCE) to help with any seasonal maintenance needs, like taxes, major life events and milestones, and more!

Any questions, suggestions, or feedback? Email support@trustworthy.com. We'd love to hear from you!