

Attorney & Counselor at Law

Member, Wealth Counsel Estate Planning Attorneys

Organizing one's information to assist family members when they step in to help:

1. Keep updated information available
 - a. Medications
 - b. Doctors
 - c. Accounts / Assets – Ownership information & Beneficiary information
 - i. Bank Checking & Savings
 - ii. Investment
 - iii. Retirement
 - iv. Annuities
 - v. Life Insurance
 - vi. Vehicles
 - vii. Real Property
 - viii. Personal Property
 - d. Income
 - i. How much do you receive?
 - ii. How often?
 - e. Loans and Credit Cards
 - i. Account numbers
 - ii. How much is owed
 - iii. Include loans to family members or friends
 - f. Life insurance, health insurance, long-term care insurance
 - i. Policy numbers
 - ii. Policies and coverage information
 - g. Where you keep your important documents (and how to access them)
 - h. Passcodes & ID numbers
 - i. Social Security Number
 - ii. Computer passwords
 - iii. Label keys
 - iv. Safe combinations
 - i. People who you would like to be notified if case of emergency
 - i. Phone numbers
 - ii. Addresses
 - j. Pets
 - i. Instructions for care
 - ii. Any advance plans you've made
 - k. Subscriptions that may need to be cancelled (Newspapers, magazines, etc.)
 - l. Funeral/memorial service pre-planning
 - i. Have you pre-paid?
2. Tell the important people in your life about your wishes and plans.
 - a. Leaving instructions for feuding families, while you're still living and still have capacity to make those choices.