

HOW TO PLAN AHEAD FOR YOUR LOVED ONES

A checklist to be better prepared

☐ Have current contact information for relatives, close friends, and advisers—

- Include important data such as location of records and full names of advisers (accountant/attorney/clergy/financial planner, etc.)
- Have name and phone number readily available for two 'in case of emergency' contacts

☐ Make your faith traditions and/or final wishes known—

- Have your desires clearly documented so others can effectively adhere to your desired traditions/wishes
- Complete a funeral planner checklist/workbook

☐ Make copies of any/all legal documents, and keep in a common location—

- Birth certificate
- Social Security card
- Driver's license and passport
- Military papers
- Medical insurance card (copy both front and back)
- Marriage certificate
- Title cards for any vehicles owned
- Certificate of Title or Abstract for real estate, including deed to burial plot
- Life insurance policies (including beneficiary information)
- Disability and/or Long Term Care (LTC) insurance policies
- Property/Casualty insurance policies (auto, homeowners, personal umbrella)
- Tax returns
- Estate plan documents (wills/trusts, power of attorney, healthcare directives, pre-marital agreements, etc.)
- Business agreements

☐ List of any medical situations and copies of insurance coverage/benefits—

- Name of favored clinic/hospital with preferred doctor's name and phone number
- Known past and present medical conditions, including allergies
- List of all medications (frequency and dosage), including herbals and/or over-the-counter remedies
- Health insurance coverage
- Long Term Care insurance benefits

**□ List of financial holdings and institutions where held—
(including ownership/title and account numbers)**

- Bank accounts (savings/checking/CDs) and name of personal banker
 - ◆ Make known to someone you trust where you keep your checkbook, key for Safe Deposit box, and any/all debit/credit cards
- Brokerage accounts and name of broker
- Individually held stocks and/or bonds
- Retirement accounts and names of custodians and/or employers
- Life insurance and name of agent/agency
- Real estate (residence and/or other properties)
- Business interests
- Vehicles (make/model and where stored)
- Other valuables (antiques/artwork/precious metals/jewelry/furs/collections); also document with pictures and appraisals, if possible
- Any outstanding asset(s) due, such as promissory notes

**□ List of indebtedness and creditors—
(including ownership/title and account numbers)**

- Real estate mortgages, liens, and/or other encumbrances
- Vehicle loans
- Bank and/or other loans
- Credit cards (having copies of front and back is helpful if lost/compromised)
- Lines of credit
- Any other outstanding debt owed

□ Review this list regularly with some your trust—

We hope this overview is insightful. Please let us know how we can best assist you.