

## **Organizing For Life's Unplanned Moments**

*You never know when disaster can strike, and it's better to be somewhat prepared then not prepared at all, and your family/friends will certainly "thank you" for putting the effort forth to ease any unforeseen burdens life can lob our way.*

**We suggest gathering the documents or information below and placing it somewhere that your spouse, family, or executor/personal representative can easily find.**

### **Insurance Policies**

- Life Insurance
- Car Insurance
- Home Insurance
- Other Insurance policies (long term care, specialty policies)

### **Financial Assets**

*Create a list of accounts showing account numbers and ownership*

- Bank accounts
- Brokerage accounts
- Cryptocurrency accounts
- Paypal/Venmo/other
- Prepaid debit cards

### **Credit Cards**

- Issuer (name of the credit institution, ex: Chase, Citi Bank, American Express, etc.)
- Card number
- Log in and password information for online account management (and recovery e-mail account log in details.)

### **Mortgages or Loans**

- Company through which mortgage or loan was given
- A copy of a mortgage statement, or loan agreement

### **Pension Plans and Retirement Benefit Information**

- 401(k) or 403(b) plans
- IRAs
- Roth IRAs
- Simplified Employee Pension (SEP) plan
- Pensions

### **Title or Deeds to Any Property**

- Real Estate
- Motor Vehicles
- Boats
- Other

### **Other Assets**

- Trusts you are a beneficiary of
- Partnership or business interests
- Tradenames, patents, or copyrights

### **Your Estate Planning Documents**

#### **Safe Deposit Box**

- Location of safe deposit box
- Safe deposit box keys or location of safe deposit keys
- If you have a safe, the combination should be recorded

#### **List Your Team of Professionals and their Contact Information**

- Lawyer
- Accountant
- Insurance Agent
- Broker
- Banker

#### **Proof of Identity and Relationships**

- Social Security card
- Marriage certificate
- Divorce certificate
- Prenuptial agreements

**E-mail Accounts**

*List out user name and password for each account, and security question and answers – if applicable.*

**Online Business & Social Media Accounts**

*List out user name and password for each account, and security question and answers – if applicable.*

- Amazon
- Ebay
- Facebook
- LinkedIn
- Instagram

Provide instruction for your wishes about removing/keeping social media profiles, often called "Legacy Account".