MAKING YOUR WISHES COME TRUE

Simplify end-of-life planning with this checklist

Planning your legacy can be a seamless process when you, first, know where to begin and, second, understand the steps that lead to your final wishes being communicated and followed. Use this handy checklist to gather items that will simplify executing your estate so loved ones have one less worry.

ESSENTIALS

- ☐ Letter of Instruction
  - o List of all assets
  - o Location of all legal and financial documents and safe deposit box keys
  - o List of financial account beneficiaries and other estate beneficiaries with contact information
  - o Names and contact information for bankers, brokers, attorneys, CPA, retirement advisors or other professionals who handle assets
  - o Contact information of any debtors (mortgage, credit cards, car loans, etc.)
  - o Preferred charities for donations
  - o Instructions for placement of pets
  - o Personal wishes for family members
- ☐ Will
- ☐ Trust documents

LIFE EVENTS

- ☐ Birth certificate
- ☐ Social Security card
- ☐ Citizenship papers
- ☐ Marriage license
- ☐ Divorce papers
- ☐ Burial instructions

PROOF OF OWNERSHIP

- ☐ Housing, land and cemetery titles and/or deeds
- ☐ Escrow mortgage accounts
- ☐ Proof of loans made and debts owed
- ☐ Vehicle titles
- ☐ Stock certificates, savings bonds and brokerage accounts
- ☐ Partnership and corporate operating agreements
- ☐ Tax returns

LIFE INSURANCE AND RETIREMENT

- ☐ Life insurance policies
- ☐ Individual retirement accounts (IRAs)
- ☐ 401(k)/403(b) accounts
- ☐ TRS/pension documents
- ☐ Annuity contracts

BANK ACCOUNTS

- ☐ List of bank accounts
- ☐ List of all user names and passwords
- ☐ List of safe deposit boxes and keys

HEALTH CARE

- ☐ Personal and family medical history
- ☐ Durable health care power of attorney
- ☐ Authorization to release health care information
- ☐ Living will
- ☐ Do-not-resuscitate order

Need help executing any of these items or understanding how they can fit into your legacy plans? Contact us for help.

Agent Name

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ideal producers group