



## Family Financial Preparedness Checklist

### DOCUMENTS, ADVISORS, & PERSONAL REPRESENTATIVE(S)

- Where are your legal documents located? (including Wills, Trusts, Powers of Attorney, Advanced Medical Directive, etc.): Provide locations for actual and digital copies
- Who are your professional advisors? Provide contact information for attorney, CPA, investment advisor, insurance agent (life and/or property casualty), other
- Who are your executors, trustee, co-trustee, successor trustee, durable power of attorney (DPOA), etc.?
- Is there a guardian named for minor children and/or children/other relatives with special needs? If so, do they know they are named in the documents?
- Who will care for domestic pets and/or farm animals if applicable?
- Have you completed an Advance Directive to spell out your wishes for end-of-life palliative care, burial, and organ donation?

### IDENTIFYING ASSETS & LIABILITIES

- Identify all bank/financial institutions where assets are held:
  - Usernames, passwords, titling information, account numbers, URLs for banks, investment accounts (taxable, trust, retirement), deferred compensation plan accounts, pension accounts, social security, etc.
  - IRA accounts and life insurance policies require claim forms: make sure the beneficiaries know about any policies/accounts and who to contact.
- Identify all real assets and liabilities: residence, vacation property/second residence, rental property, business interests, vehicles, artwork, valuable personal property/collectibles
  - Username; passwords; account numbers; URLs for mortgages, utilities, credit cards, other debt, property & casualty insurance, etc.
  - How are assets titled?
- Identify all insurance and other benefit providers:  
Usernames; passwords; account numbers; URLs for medical, dental, vision insurance, Medicare, life insurance, long-term care, disability insurance, airline miles, etc.
- Location of titles for vehicles, recreational vehicles, deed(s) for property, other
- Provide your executor/personal representative/trustee with access to your computer, email, cell phone, social media accounts, and subscriptions.