



Family Financial Preparedness Checklist

DOCUMENTS, ADVISORS, & PERSONAL REPRESENTATIVE(S)

- Where are your legal documents located? (this includes 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 your attorney, CPA, investment advisor, insurance agent (life and/or property casualty), and any other advisors.
- Who are your executors, trustee, co-trustee, successor trustee, and anyone who holds 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? Provide the location of an actual and digital copy.

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. Password manager programs (like LastPass, iPassword, and Keeper) make it easier to share this information.
 - 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. (Again, password manager programs make this easier to share.)
 - 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 properties, and other titled assets
- Provide your executor/personal representative/trustee with access to your computer, email, cell phone, social media accounts, and subscriptions.