

# Life & Legacy Planning Checklist

The most important plan of your life.

## Getting Started

Here is a checklist of some of the essential documents, accounts, and types of information you should organize and have at the ready before starting your planning.

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### INSURANCE INFO

- Life Insurance
- Health Insurance
- Car Insurance
- Home Insurance
- Renters Insurance
- Long-Term Care Insurance
- Funeral Insurance
- Disability Insurance
- Disaster Insurance
- Other Insurance Policies (Example: Umbrella, Personal Articles)

### BANK ACCOUNTS / MORTGAGE / LOANS

Have a recent account statement for each, location of related items (example: checkbooks, passbooks), and account/login and password for online management.

- Checking
- Savings
- Money Market
- Certificate Of Deposit (CDs)
- Mortgage Info
- Loan Info
- Other (Example: Debit Card, Promissory Note):

### CREDIT CARDS

Have a recent account statement for each account and login/password for online management.

- American Express    Last 4 Digits: \_\_\_\_\_ Exp. Date: \_\_\_\_\_
- Discover    Last 4 Digits: \_\_\_\_\_ Exp. Date: \_\_\_\_\_
- Mastercard    Last 4 Digits: \_\_\_\_\_ Exp. Date: \_\_\_\_\_
- Visa    Last 4 Digits: \_\_\_\_\_ Exp. Date: \_\_\_\_\_
- Other:



## INVESTMENTS / PENSIONS / BENEFITS

Have a recent account statement for each account & current login and password for online management.

- |                                                                                  |                                              |
|----------------------------------------------------------------------------------|----------------------------------------------|
| <input type="checkbox"/> Stocks                                                  | <input type="checkbox"/> Bonds               |
| <input type="checkbox"/> Mutual Funds                                            | <input type="checkbox"/> Military Benefits   |
| <input type="checkbox"/> 401(k)                                                  | <input type="checkbox"/> 403(b)              |
| <input type="checkbox"/> IRA                                                     | <input type="checkbox"/> Roth IRA            |
| <input type="checkbox"/> Pension (SEP / SARSEP)                                  | <input type="checkbox"/> 529/College Savings |
| <input type="checkbox"/> Other (Example: Trust Fund, Specific Employee Benefits) |                                              |

## PROPERTY DEEDS / TITLES

- |                                              |                                                      |
|----------------------------------------------|------------------------------------------------------|
| <input type="checkbox"/> Real Estate (owned) | <input type="checkbox"/> Real Estate (rented/leased) |
| <input type="checkbox"/> Motor Vehicles      | <input type="checkbox"/> Boats                       |
| <input type="checkbox"/> Other               |                                                      |

## UNLOCKING ELECTRONICS / SECURITY

This is to ensure someone you trust knows how to access the following. Have current login & password.

- |                                        |                                           |
|----------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Mobile Phone  | <input type="checkbox"/> Password Manager |
| <input type="checkbox"/> Home Security | <input type="checkbox"/> Tablet           |
| <input type="checkbox"/> Computer(s)   | <input type="checkbox"/> Wi-Fi            |
| <input type="checkbox"/> Other         |                                           |

## DIGITAL ACCOUNTS / SERVICES

Be prepared to identify all of the following digital accounts and services you use.

- |                                                                                      |                                                                 |
|--------------------------------------------------------------------------------------|-----------------------------------------------------------------|
| <input type="checkbox"/> Email                                                       | <input type="checkbox"/> Entertainment (Video / Music / Gaming) |
| <input type="checkbox"/> Cloud Storage                                               | <input type="checkbox"/> Food / Delivery                        |
| <input type="checkbox"/> Health / Medical (medication)                               | <input type="checkbox"/> Messaging / Voice-over-IP              |
| <input type="checkbox"/> Money Management                                            | <input type="checkbox"/> Shopping                               |
| <input type="checkbox"/> Social Media                                                | <input type="checkbox"/> Software Licenses                      |
| <input type="checkbox"/> Travel / Ticketing                                          | <input type="checkbox"/> Web Hosting / Blogging                 |
| <input type="checkbox"/> Other (Example: Photography, Organization, Productivity...) |                                                                 |

