

# GETTING YOUR DUCKS IN A ROW: DOCUMENTS ADULTS NEED

While we firmly believe life is meant to be lived, we also know that it's important to have peace of mind in the event of an emergency. We've put together a detailed checklist to help you organize your life.

## TOP 4 IMPORTANT DOCUMENTS ADULTS NEED BUT DON'T HAVE:



A WILL

— aka —

### Last Will & Testament

A will essentially states: when I die, here's what I want to happen.



A LIVING WILL

— aka —

### an advance directive

In this document, you'll declare your wishes for end-of-life care.



DURABLE HEALTH CARE POWER OF ATTORNEY

— aka —

### a health care proxy

In the event that you can't make your own health care decisions, you need to have someone you trust like a family member or friend.



DURABLE FINANCIAL POWER OF ATTORNEY

— aka —

### an attorney-in-fact/agent

This document outlines who you want to make financial decisions if you can't make them for yourself.

## CRITICAL DOCUMENTS

Locate and safely store the following items:

- > **Official Documents:**
  - ✔ Power of Attorney
  - ✔ Will & Living Will
  - ✔ Trusts
- > **Insurance Info:**
  - ✔ Life Insurance
  - ✔ Car Insurance
  - ✔ Insurance
  - ✔ Disability Insurance
  - ✔ Health Insurance
  - ✔ Home/Renters
  - ✔ Funeral Insurance
- > **Identification:**
  - ✔ Birth Certificate
  - ✔ Passport
  - ✔ Citizenship Documentation
  - ✔ Divorce Decree / Settlement Info
  - ✔ Driver's License
  - ✔ Armed Forces ID/ Discharge Papers
  - ✔ Marriage Certificate
  - ✔ Social Security Card

## ACCOUNT ACCESS

Ensure someone you trust knows how to access the following:

- > **Personal Electronics/ Digital Accounts:**
  - ✔ Phone Password
  - ✔ Tablets
  - ✔ Email
  - ✔ Wi-Fi
  - ✔ Computer Password

## ACCOUNT INFO & PASSWORDS

Locate and safely store account numbers & passwords. Ensure someone you trust knows how to access the following:

- > **Bank & Mortgage:**
  - ✔ Checking
  - ✔ Savings
  - ✔ Money Market
  - ✔ Mortgage Info
- > **Credit Cards & Loans:**
  - ✔ Credit Cards
  - ✔ Auto Loans
  - ✔ Student Loans
  - ✔ Additional Loans
- > **Investments & Benefits:**
  - ✔ 401(k)
  - ✔ Roth IRA
  - ✔ 529/College Savings
  - ✔ Mutual Funds
  - ✔ 403(b)
  - ✔ Pension
  - ✔ Stocks & Bonds
  - ✔ Military benefits
  - ✔ IRA
- > **Property Deeds & Titles:**
  - ✔ Real Estate (owned)
  - ✔ Real Estate (rented/ leased)
  - ✔ Motor Vehicles
  - ✔ Other
  - ✔ Boats

Want more ways to organize your financial documents?

CONTACT US TODAY.

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