



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



A living will



Durable health care power of attorney



Durable financial power of attorney

Last will & testament

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

An advance directive

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

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.

An attorney-in-fact or agent

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

Want tips on how to organize your financial documents?

Use the handy checklists on the back to ensure your documents are easily available when they are needed.

CRITICAL DOCUMENTS

Locate and safely store the following items:

OFFICIAL DOCUMENTS:

- Will
- Living Will
- Health Care Power of Attorney
- Financial Power of Attorney
- Trusts

IDENTIFICATION:

- Birth Certificate
- Driver's License
- Social Security Card
- Passport
- Armed Forces ID/Discharge Papers
- Citizenship Documentation
- Marriage Certificate
- Divorce Decree/Settlement Info

INSURANCE INFO:

- Life Insurance
- Health Insurance
- Car Insurance
- Home/Renters Insurance
- Funeral Insurance
- Disability Insurance

ACCOUNT ACCESS

Ensure someone you trust knows how to access the following:

PERSONAL ELECTRONICS/ DIGITAL ACCOUNTS:

- Phone Password
- Computer Password
- Tablets
- Email
- Wi-Fi

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)
- 403(b)
- IRA
- Roth IRA
- Pension
- 529/College Savings
- Stocks & Bonds
- Mutual Funds
- Military benefits

PROPERTY DEEDS & TITLES:

- Real Estate (owned)
- Real Estate (rented/leased)
- Motor Vehicles
- Boats
- Other

This material was created for educational and informational purposes only and is not intended as ERISA, tax, legal or investment advice. If you are seeking investment advice specific to your needs, such advice services must be obtained on your own separate from this educational material. ©2020 401k Marketing, LLC. All rights reserved. Proprietary and confidential. Do not copy or distribute outside original intent.