



Life is a journey that begins and ends with family.  
Are you protecting yours?



## EXCLUSIVE ESTATE ADMINISTRATION

Fiduciary and Estate  
Management Services

PREPARE | PREVENT | PROTECT

# Getting Your Affairs in Order

What would happen if you were to fall ill or even worse, die, tonight? Realizing that it *can* happen to you, and being prepared for your death (or debilitating injury or illness), will give a tremendous sense of personal security to you and relief to your loved ones.

## Organize and Protect Important Papers

Keep important papers and original documents in a fire-proof safe. Advise your loved ones, trustee, executor and anyone assisting in managing your affairs, where your estate management information is located.

### Personal Records

- Full legal name
- Social Security number
- Legal residence
- Date and place of birth
- Names and addresses of spouse and children
- Location of birth and death certificates and certificates of marriage, divorce, citizenship, and adoption
- Employers and dates of employment
- Education and military records
- Names and phone numbers of religious contacts
- Memberships in groups and awards received
- Names and phone numbers of close friends, relatives, and lawyer or financial advisor
- Names and phone numbers of doctors
- Medications taken regularly

### Financial Records

- Sources of income and assets (pension, 401K, IRAs, investment dividends)
- Social Security and Medicare information
- Insurance information (life, health, long-term care, home, auto). Include policy numbers and agent information.
- Name and number(s) of bank accounts
- Investment income (stocks, bonds, property) and investment broker or financial advisor contact information.
- Copy of most recent income tax return
- Liabilities, including property taxes owed, to whom, due date)
- Mortgages and debts (credit cards, personal loans and lines of credit).
- Location of original deed of trust for home and auto title and registration
- Location of safe deposit box and key
- Computer login credentials
- Military and veteran benefits

## Legal Tasks Checklist

- Update your Will**  
Allows you to name a guardian for your children and specify the beneficiaries of your assets upon your death.
- Update your Trust**  
Specifies the rules that you want followed for property held in trust for your beneficiaries. Reduces the estate tax liability, to protect property in your estate, and to avoid probate.
- Update your Advance Health Care Directive**  
Legal document in which you specify what actions should be taken for your health when you are no longer able to make decisions for yourself due to illness or incapacity.
- Update your Power of Attorney**  
Allows you to appoint a person or an organization to manage your affairs if you become unable to do so.
  - Finances
  - Health Care
- Review Beneficiary Designations**  
and account titles to ensure proper wording.

SCHEDULE A FREE  
CONSULTATION  
855-463-3286

## Top 5 Benefits of Engaging a Fiduciary

### Neutral 3rd Party

Avoid conflict between beneficiaries

### Save Time

Allow a professional to manage your affairs.

### Avoid Probate

and the potential loss of assets in Court.

### Save Money

eliminate the risk of probate and mismanaged assets.

### Peace of Mind

Reassurance that your affairs are being managed.