



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

Aside from birth, dying is the only other experience we will all share. So why is it so hard to talk about it? And why is so important that we should? Realizing that it *can* happen to you, and being prepared will give a tremendous sense of personal security to both you, your loved ones, and those you have appointed to act on your behalf (Trustee, Power of Attorney, and Executor). Organizing these documents is one of the most important steps any person can take to make sure their property and health care wishes are honored, and that loved ones are provided for.

Review these lists of documents that you should have organized:

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.