

## **Organizing one's information to assist family members when they step in to help:**

1. Keep updated information available
  - a. Medications
  - b. Doctors
  - c. Accounts / Assets – Ownership information & Beneficiary information
    - i. Bank Checking & Savings
    - ii. Investment
    - iii. Retirement
    - iv. Annuities
    - v. Life Insurance
    - vi. Vehicles
    - vii. Real Property
    - viii. Personal Property
  - d. Income
    - i. How much do you receive?
    - ii. How often?
  - e. Loans and Credit Cards
    - i. Account numbers
    - ii. How much is owed
    - iii. Include loans to family members or friends
  - f. Life insurance, health insurance, long-term care insurance
    - i. Policy numbers
    - ii. Policies and coverage information
  - g. Where you keep your important documents (and how to access them)
  - h. Passcodes & ID numbers
    - i. Social Security Number
    - ii. Computer passwords
    - iii. Label keys
    - iv. Safe combinations
  - i. People who you would like to be notified if case of emergency
    - i. Phone numbers
    - ii. Addresses
  - j. Pets
    - i. Instructions for care
    - ii. Any advance plans you've made
  - k. Subscriptions that may need to be cancelled (Newspapers, magazines, etc.)
  - l. Funeral/memorial service pre-planning
    - i. Have you pre-paid?
2. Tell the important people in your life about your wishes and plans.
  - a. Leaving instructions for feuding families, while you're still living and still have capacity to make those choices.