YOUR ACTION CHECKLIST · ANDREW BREWER, CFP®

# Does Your Family Know Where Everything Is?

Print this, check things off, and bring it to your first meeting. You don't need every box checked. You just need to start.

## This week

- [ ] **Ask one question.** "If something happened, where would I find your paperwork?" If your parents can't answer it, that's your starting point.
- [ ] **Locate the powers of attorney.** Financial and healthcare, plus any health care directive. These are needed first if someone can't speak for themselves.
- [ ] **Find the will or trust.** Note where the originals are kept. Your family can't follow a plan they can't find.

## This month

- [ ] **List every account on one page, and tell one person where it lives.** Each bank, CD, retirement account, and insurance policy. It ends the "did Mom have a second bank?" guessing.
- [ ] **Write down final wishes.** Burial or cremation, and the kind of service. One written answer beats two different conversations.
- [ ] **List the bills and how they're paid.** Due dates, autopay, anything paid by check. Bills keep coming even when life stops.
- [ ] **Sort out logins and phone access.** Keep a password manager code somewhere safe; consider naming an Apple Legacy Contact. Getting locked out makes everything slower.
- [ ] **Inventory and insure valuables.** Coins, stamps, jewelry, guns, collectibles. So nothing valuable gets given away by accident.

## Bring to your first meeting

| What to bring | Have it? |
|---|---|
| Will or trust (or a note on where it's kept) | |
| Financial and healthcare powers of attorney | |
| Your one-page list of accounts | |
| Written final wishes | |

> *"Being organized isn't really for you. It's for the people who have to care for you or take care of your stuff." — Andrew*

**Want a second set of eyes?** Schedule a complimentary meeting by phone, video-conference, or in our office. Call (866) 626-3990 or book a no-obligation discovery call at www.todaysretirees.com.

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