



# HELP PRESERVE YOUR LEGACY

*Checklist*

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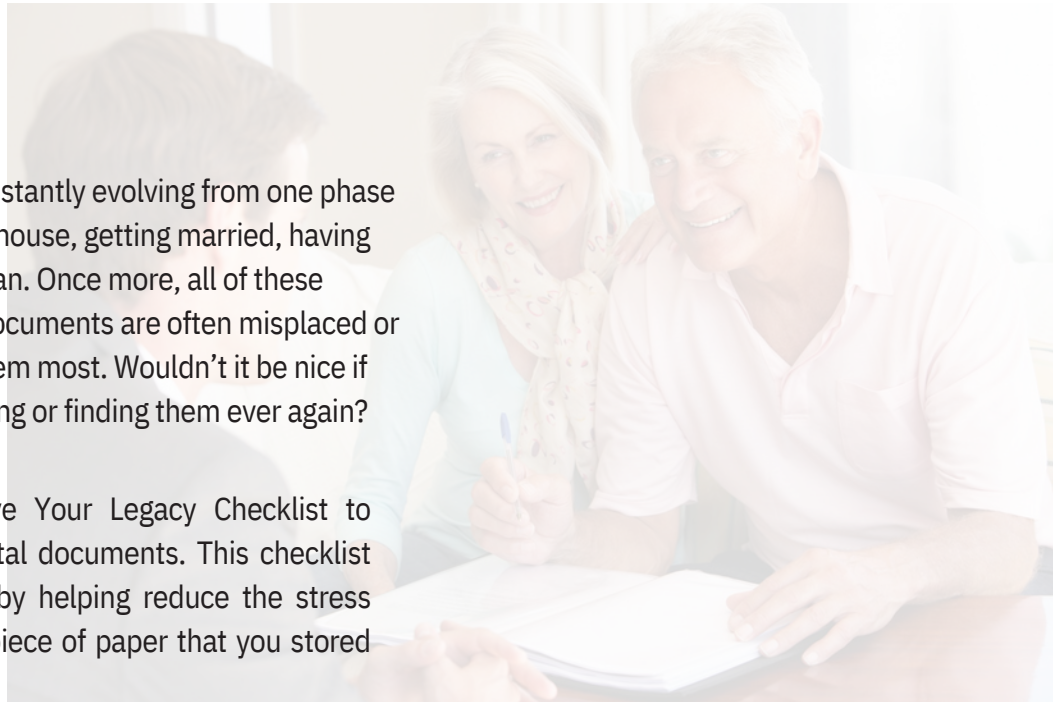
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In today's world, our lives are constantly evolving from one phase to the next — a new job, buying a house, getting married, having kids, and creating a retirement plan. Once more, all of these events are documented. These documents are often misplaced or forgotten about until you need them most. Wouldn't it be nice if you never had to worry about losing or finding them ever again?

We designed the Help Preserve Your Legacy Checklist to organize and store all of your vital documents. This checklist provides added peace of mind by helping reduce the stress associated with trying to find a piece of paper that you stored away 15 years ago.

We encourage you to share the Help Preserve Your Legacy Checklist with your family, financial professional, attorney, accountant, and executor. This way, everyone will know exactly where to find information pertinent to your future.

With the Help Preserve Your Legacy Checklist, you can have added peace of mind knowing that your family will have your future wishes in one easily accessible location.



If you need assistance completing this document, we are more than happy to help. Please consult your attorney and/or certified public accountant regarding any legal or tax matters in this document.

	IMPORTANT CONTACTS	NAME	PHONE NUMBER
	Financial Professional		
	CPA/Accountant		
	Insurance Agent		
	Attorney		
	Executor of Estate		

	EMERGENCY PAPERS and/or INFORMATION	LOCATION
✓	<b>GENERAL ITEMS</b>	
	Birth certificate	
	Social Security card	
	Passport/certificate of citizenship (naturalization papers)	
	Driver's license number and expiration date	
	Adoption papers	
	Marriage certificate	
	Prenuptial agreement	
	Divorce or separation papers	
	Safe deposit box(es) and keys	
	Safe and combination	
✓	<b>INVESTMENT DOCUMENTS</b>	
	Brokerage account statements	
	Mutual fund account statements	
	Annuity account statements	
	Individual retirement plan statements	
	Company retirement plan statements	
	Other company benefits (e.g., deferred compensation)	
	Stock certificates not held in an account	

	EMERGENCY PAPERS and/or INFORMATION	LOCATION
✓	INVESTMENT DOCUMENTS CONTINUED Bearer bonds	
	not held in an account Alternative investment documents	
	(including K-1s) Investment club documents/records 529	
	college savings plan statements Online securities access	
	information Beneficiary forms for IRAs, 401(k)s, or other	
	benefits plans Documents showing cost basis of securities	
	owned or sold <b>INSURANCE DOCUMENTS</b> Life insurance	
	policy documents Group life policies Health and accident	
✓	insurance ID cards and claim records Variable annuity or	
	fixed annuity statements/documents Mortgage insurance	
	policy Travel insurance policy Property and casualty policy	
	documents Veterans administration insurance papers	
	Beneficiary forms for insurance or annuity policies Long-	
	term care insurance policy <b>PERSONAL FINANCE</b>	
	<b>DOCUMENTS</b> Appraisals for valuable items Inventory of	
	valuable items Buy/sell or partnership agreements	
	Deferred compensation agreements Federal/state gift tax	
	returns Prior years' tax returns Motor vehicle title and/or	
	registration papers	
✓		

	EMERGENCY PAPERS and/or INFORMATION	LOCATION
✓	<b>PERSONAL FINANCE DOCUMENTS CONTINUED</b>	
	Lawsuit paperwork or documents on pending legal actions	
	Promissory notes	
	Outstanding loans	
	Mortgage documents	
	Medical bills/records and prescription plan card	
	Property and school tax records	
	Real estate deeds and/or other titles of ownership	
	Rental and/or lease agreements	
	Trust documents/agreements	
✓	<b>BANK/CREDIT DOCUMENTS</b>	
	Checking or money market account statements	
	Checks	
	Savings accounts	
	Credit cards and account statements	
	Life insurance policy documents	
	Credit union account books or statements	
✓	<b>EMERGENCY DOCUMENTS</b>	
	Living will/health care proxy	
	Durable power of attorney	
	Financial institution power of attorney forms <i>Some financial institutions may refuse to accept a standard power of attorney.</i>	

	PAPERWORK FOR FINAL ARRANGEMENTS	LOCATION
	<p>Last will and testament  <i>Wills should not be kept in a safe deposit box. Rather, wills should be stored in either a lawyer's will safe or a fireproof safe at your home.</i></p>	
	<p>Military discharge papers  <i>Veterans receive a small stipend toward burial expenses.</i></p>	
	Burial instructions	
	Cemetery plot deed	
	Prepaid cremation documents	
	Funeral home preference and information	
	Charitable donations preference(s)	
	Letter of instruction (if available) from the deceased to the executor	
	Death certificate	
	<i>The number of accounts or titles of ownership of the deceased.</i>	
	<p>Phone number/address of the county surrogate court  <i>The county court or clerk's office where the deceased resided will oversee estate matters and probate. The executor must obtain a sufficient number of death certificates for transferring ownership of accounts, titles, etc.</i></p>	

## NOTES



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This is for informational purposes only.