

What your spouse or partner needs to know – A Helpful Checklist

Personal

- Banks accounts
 - Account numbers
 - Statement copies – where they are kept
 - Passwords

- Investment accounts
 - Account numbers
 - Statement copies – where they are kept
 - Passwords
 - Any retirement accounts – where. who to contact, etc.
 - Financial advisor contact information

- Wills / Trusts
 - Executor contact info
 - Attorney contact info
 - Funeral arrangement preferences and/or pre-paid arrangements
 - Any other letters of instruction you may wish to leave behind – where are they?

- Insurance – Life, House, Health, Auto, Annuity Contracts, Other
 - Copies of policies – where they are kept
 - Agent contact info
 - How about any long-term care policies
 - VA benefit information

- Real estate
 - Property deeds
 - Related mortgage/s –
 - Property/ School taxes
 - Copies of bill and payments – where they are kept
 - PIN #
 - Are the taxes escrowed by the mortgage company?

- Personal Property
 - High value Jewelry – incl. appraisals
 - Sentimental possessions and keepsakes
 - Take Photos pf your House
 - TIP: Keep digital copies off premises

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- Safety deposit boxes or safe
 - Where the box is, and where the key is
 - What's the combination and or where are the keys kept for your safe
- Loans
 - Mortgage/s and/or Lines of Credit– with whom, where the statements are kept, account numbers
 - Credit cards – with whom, where the statements are kept, account numbers
 - Other – perhaps autos, special financing on furniture, carpets, or ????
- Cars, boats and other titled Property
 - Title – where is it kept?
 - Is there a lien on it? And if so, with whom?
- Contact information for your employer
 - Any group insurance or other employer insurance?
 - Any deferred compensation plan?
 - Any retirement benefits?
- Unpaid Bills - a general overview of what needs to get paid and when
 - Especially property tax bills
- Key Contacts other than those listed above:
 - Primary Physician
 - Guardian for Minors if applicable
 - Powers of Attorney / Power of Health
 - Utility Providers – contact info, account numbers
- Where do you keep Important documents
 - Birth certificates
 - Passports
 - Marriage / divorce / separation papers
 - Cemetery plot deed
 - Social Security Card
 - Adoption Papers
 - Military discharge papers
 - Pre-nuptial arrangement papers

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Business

- Access to any business you own
 - Keys to the premises
 - Security codes
 - Landlord (if leased) information
 - Key people – partners, vice-presidents, personnel

- General
 - Incorporation papers – where's the file?
 - Rental Contracts & Leases
 - Buy/Sell Agreements

- Operating banks accounts
 - Which bank(s) – location and account numbers
 - Access or Signature authority
 - Checks – where are they kept
 - On-line passwords

- Professional Contacts Info
 - Attorney
 - Accountant
 - Banker

- Computer access
 - List of software and systems
 - Passwords

- Financing – Loans or Lines of Credit
 - With whom, terms
 - Where are the statements are kept
 - Balances owed

- Payroll information
 - Personnel files
 - Payroll Records
 - Payroll System access (password) or
 - Ledgers/Spreadsheets
 - Payroll tax filings

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- Insurance – Life, Building and Property, Health, Auto, Other
 - Copies of policies – where they are kept
 - Agent contact info
 - Other Benefit Plans – Stock Options,

- Tax returns– where are your copies kept
 - Federal
 - State
 - Local

- Business Licenses
 - City/Village

- Time sensitive material

- Copies of Contracts – employees, customers, landlords, etc. – where are they kept?

- Unpaid Bills - a general overview of what needs to get paid and when
 - Especially property tax bills AND
 - Payroll tax Liabilities

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