

Life & Legacy Planning Checklist

The most important plan of your life.

Getting Started

Here is a checklist of some of the essential documents, accounts, and types of information you should organize and have at the ready before starting your planning.

INSURANCE INFO

- | | | |
|--|---|---|
| <input type="checkbox"/> Life Insurance | <input type="checkbox"/> Health Insurance | <input type="checkbox"/> Car Insurance |
| <input type="checkbox"/> Home Insurance | <input type="checkbox"/> Renters Insurance | <input type="checkbox"/> Long-Term Care Insurance |
| <input type="checkbox"/> Funeral Insurance | <input type="checkbox"/> Disability Insurance | <input type="checkbox"/> Disaster Insurance |
| <input type="checkbox"/> Other Insurance Policies (Example: Umbrella, Personal Articles) | | |

BANK ACCOUNTS / MORTGAGE / LOANS

Have a recent account statement for each, location of related items (example: checkbooks, passbooks), and account/login and password for online management.

- | | |
|--|---|
| <input type="checkbox"/> Checking | <input type="checkbox"/> Savings |
| <input type="checkbox"/> Money Market | <input type="checkbox"/> Certificate Of Deposit (CDs) |
| <input type="checkbox"/> Mortgage Info | <input type="checkbox"/> Loan Info |
| <input type="checkbox"/> Other (Example: Debit Card, Promissory Note): | |

CREDIT CARDS

Have a recent account statement for each account and login/password for online management.

- | | | |
|---|----------------------|------------------|
| <input type="checkbox"/> American Express | Last 4 Digits: _____ | Exp. Date: _____ |
| <input type="checkbox"/> Discover | Last 4 Digits: _____ | Exp. Date: _____ |
| <input type="checkbox"/> Mastercard | Last 4 Digits: _____ | Exp. Date: _____ |
| <input type="checkbox"/> Visa | Last 4 Digits: _____ | Exp. Date: _____ |
| <input type="checkbox"/> Other: | | |



INVESTMENTS / PENSIONS / BENEFITS

Have a recent account statement for each account & current login and password for online management.

- | | |
|--|--|
| <input type="checkbox"/> Stocks | <input type="checkbox"/> Bonds |
| <input type="checkbox"/> Mutual Funds | <input type="checkbox"/> Military Benefits |
| <input type="checkbox"/> 401(k) | <input type="checkbox"/> 403(b) |
| <input type="checkbox"/> IRA | <input type="checkbox"/> Roth IRA |
| <input type="checkbox"/> Pension (SEP / SARSEP) | <input type="checkbox"/> 529/College Savings |
| <input type="checkbox"/> Other (Example: Trust Fund, Specific Employee Benefits) | |

PROPERTY DEEDS / TITLES

- | | |
|--|--|
| <input type="checkbox"/> Real Estate (owned) | <input type="checkbox"/> Real Estate (rented/leased) |
| <input type="checkbox"/> Motor Vehicles | <input type="checkbox"/> Boats |
| <input type="checkbox"/> Other | |

UNLOCKING ELECTRONICS / SECURITY

This is to ensure someone you trust knows how to access the following. Have current login & password.

- | | |
|--|---|
| <input type="checkbox"/> Mobile Phone | <input type="checkbox"/> Password Manager |
| <input type="checkbox"/> Home Security | <input type="checkbox"/> Tablet |
| <input type="checkbox"/> Computer(s) | <input type="checkbox"/> Wi-Fi |
| <input type="checkbox"/> Other | |

DIGITAL ACCOUNTS / SERVICES

Be prepared to identify all of the following digital accounts and services you use.

- | | |
|--|---|
| <input type="checkbox"/> Email | <input type="checkbox"/> Entertainment (Video / Music / Gaming) |
| <input type="checkbox"/> Cloud Storage | <input type="checkbox"/> Food / Delivery |
| <input type="checkbox"/> Health / Medical (medication) | <input type="checkbox"/> Messaging / Voice-over-IP |
| <input type="checkbox"/> Money Management | <input type="checkbox"/> Shopping |
| <input type="checkbox"/> Social Media | <input type="checkbox"/> Software Licenses |
| <input type="checkbox"/> Travel / Ticketing | <input type="checkbox"/> Web Hosting / Blogging |
| <input type="checkbox"/> Other (Example: Photography, Organization, Productivity...) | |

