

Taking the time to organize your affairs can make an already difficult time easier for the people you care about. Use this checklist to help ensure your family, executor, trustee, or other trusted individuals know what you have, where to find it, and whom to contact.

Estate Planning & Important Documents

- ☐ Last will and testament and/or revocable trust
- ☐ Durable financial power of attorney (DPOA)
- ☐ Healthcare power of attorney (POA), living will, and advance directives
- ☐ Beneficiary designations for retirement accounts, annuities, and life insurance
- ☐ Marriage certificate, birth certificate, Social Security card, passport, driver's license and military records

Financial Accounts & Property

- ☐ List of bank, brokerage, retirement, pension, and annuity accounts*
- ☐ Real estate documents, including deeds, mortgages, and property records
- ☐ List of valuable personal property, business interests, stock options, private investments, and other significant assets
- ☐ List of credit cards, loans, mortgages, and other debts
- ☐ Safe-deposit box location and access information
- ☐ Recent tax returns and supporting records
- ☐ List of recurring bills and automatic payments

Insurance & Benefits

- ☐ Life insurance policies and beneficiary information
- ☐ Long-term care insurance coverage and claims/contact information
- ☐ Medicare & health insurance information
- ☐ Pensions, employer benefits, deferred compensation, and stock plans
- ☐ Disability, homeowners, auto, umbrella, and other insurance policies
- ☐ If applicable, Veterans Affairs (VA) benefits, military service records, and discharge information

Digital Information

- ☐ Secure record of usernames, passwords, and PINs for important accounts and electronic devices:
 - ☐ Email accounts and online financial accounts
 - ☐ Payment apps, digital wallets, and cryptocurrency
 - ☐ Cloud storage and electronically stored documents
 - ☐ Social media accounts
 - ☐ Subscriptions and loyalty/reward programs
- ☐ Identify accounts using two-factor authentication and how the authentication method can be accessed

**Reach out to the Evans May Wealth team for assistance with this task.*

Evans May Wealth (317) 819-4610 | info@evansmay.com | www.EvansMay.com

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Personal Information & Key Contacts

- ☐ Contact information for financial advisor, CPA, attorney, insurance agent, and other trusted professionals
- ☐ Contact information for your executor, trustee, agent under your power of attorney (POA), and other key family members
- ☐ Funeral, burial, cremation, or memorial wishes
- ☐ Instructions for pets or other dependents
- ☐ Wishes regarding sentimental items, family heirlooms, photographs, and other personal property

Funeral/Service Preparation

- ☐ Make a list of important accomplishments/pieces of information you would like included in your obituary
- ☐ Consider the songs, quotes, and readings you would like included in your service
- ☐ Document where important photographs, records of accomplishments, and credentials are located so they are readily available to your family
- ☐ Consider which charitable organization(s) you would like people to donate to in lieu of flowers, if desired

5 Tips to Make Preparing Your Affairs More Manageable

- 1. Start with an inventory, not the documents.**
You do not need to gather everything at once. Start with a simple list of what you have and where it is located, such as the financial institution and type of account. This creates a roadmap and helps identify what may be missing.
- 2. Work through one category at a time.**
Break the project into smaller, more manageable pieces. Consider focusing on one category at a time to make the process feel less overwhelming.
- 3. Create a secure "When You Need It" file.**
Create one document that tells a trusted person where important information can be found. Include key contacts and locations of important documents without listing passwords, Social Security numbers, or other sensitive information.
- 4. Use a password manager for digital credentials.**
A reputable password manager can securely store usernames and passwords while providing emergency or legacy access. Make sure a trusted person knows it exists and understands your access plan.
- 5. Schedule an annual "affairs checkup."**
Choose one date each year to review your accounts, beneficiaries, insurance, contact information, and personal wishes. Revisit your information after major life events or significant financial changes.