Creating a Paper Trail for Your Heirs

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“Mr. Scott left his last will and testament in these fortune cookies.”
Where Do You Start?

- Will and/or Revocable Trust
- Advance Directives
- Organ Donation
- Funeral Arrangements (Pre-paid)

- Preference for Final Arrangements
  Who needs to be contacted first?

- Daily Details
  - Pet Care
  - House
  - Alarm

FAMILY Prosperity Initiative
Financial Literacy for All
Important Contact Information

- Employer
- Medicaid, Medicare, Insurance
- Attorney, CPA, Banks, Mortgage Policy, Banks
- Financial Advisor (broker, etc.)
- Social Security Information
- Memberships and Religious Leader Groups
- Pension and Retirement
Usernames and Passwords

Any Financial Institution

<table>
<thead>
<tr>
<th>Bank</th>
<th>Insurance</th>
<th>CPA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Cards</td>
<td>Pension</td>
<td>Medical</td>
</tr>
<tr>
<td>Social Security</td>
<td>Providers</td>
<td>Policy Numbers</td>
</tr>
<tr>
<td></td>
<td>Attorney</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Financial/Broker Accounts</td>
</tr>
</tbody>
</table>
Where Do You Keep Your Things?

Create a Location Directory

| Write down where you keep your documents. | Where do you have or keep safes? | Label your keys. Tax Records, Financial Papers, External hard drives |

**FAMILY Prosperity Initiative**
Financial Literacy for All
Items of Sentimental Value

What items mean the most to you?

Do you have collections, family heirlooms, photos that mean a lot?

Include the value and history of the items. Artwork, jewelry

Be detailed. Photos of the items always help.
Financial Liabilities

Net Worth
What you own
minus
What you owe

Assets
Bank Accounts
Savings Accounts
Certificate of Deposits
Brokerage
Stocks
Real Estate/Property
Mineral Rights
Insurance Face Value
Gold or Silver
Outstanding contracts

Liabilities
Home Mortgage
Car Loans
Student Loans
Credit Cards
Personal Loans
Any other loans
Reverse Mortgage
Bill Schedule and Due Dates

Write down due dates and if the accounts are on auto-bill pay.

Utilities, Subscriptions, Fees, Loans Payments

Taxes, Insurance Premiums, Credit Cards,
Safety Deposit Box Contents

1. Make a list of everything in your box
2. Do the proper people have access to your box (Signature Card)
3. Label the items that are important to you
# Obituary Information

## Brief Overview of Your Life

<table>
<thead>
<tr>
<th>Where were you born</th>
<th>Marriage(s)</th>
<th>Hobbies/Clubs/Religious Groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of birth</td>
<td>Military Service</td>
<td>Occupations, Employers</td>
</tr>
<tr>
<td>Where you were raised</td>
<td>Child(ren)</td>
<td>Surviving Family Members</td>
</tr>
<tr>
<td>Education</td>
<td>Awards or Accomplishments</td>
<td></td>
</tr>
</tbody>
</table>
Who Should Be Contacted?

- Friends
- Family
- Co-Workers
- Clubs or organizations
Last Wishes

Service

Final Service

Departing notes
Now What?

Have a family meeting to discuss the documentation and answer any questions.

Update your paperwork often. Every 4-5 years.
Guardianship

- Minor Children
- Pets
- Dependent Adults in your care
Thank you!

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