MEATH WEALTH ADVISORS

PARTNERED WITH JOURNEY STRATEGIC WEALTH

FOR THE RECORD

WHAT YOUR LOVED ONES NEED TO KNOW WHEN YOU CAN'T TELL THEM

Whether you use a digital folder or a physical three-ring binder, we recommend keeping everything organized in one central location. Use this guide to gather the essential information your loved ones may need in the future.

ESTATE PLANNING ESSENTIALS

Will & Trust:
Will Documents, Trust Documents, Power of Attorney

Letters of Instruction:
List of Friends & Family
Advisors to call immediately

Identity Documents *Copies of:*
Birth Certificate, Social Security Card

Digital Estate Plan & List of Passwords - *Especially:*
Phone, Computer, Financial Accounts

PROOF OF OWNERSHIP

Deeds:
Real Estate, Land, Cemetery

Mortgage:
Mortgage Information

Proof of:
Loans Made, Debts Owed

Cars, Etc:
Vehicle Titles

Investments:
Brokerage Accounts, Stock Certificates, Savings Bonds

Operating Agreements:
Business Partnerships, Corporate

Tax Documents:
Returns for past 2 - 4 years

BANK ACCOUNTS

List of Bank Accounts
Including:
How they are titled:
Joint, Trust etc

List of all Bank Logins:
Usernames, Passwords

List of Safe Deposits:
Boxes & Keys

MEDICAL

Medical History:
Personal, Family, Pet / Vet Information, Digital access (Usernames and passwords)

Living Will or Advanced Health Care Directive:
Health Care Power of Attorney, Designation of Medical Representative, Do-Not-Resuscitate Order

INSURANCE & RETIREMENT

Insurance Polices & Contracts:
Life, Long Term Care, Disability Property

Account & Beneficiary
Information:
IRA, Roth IRA, 401(K)
Life Insurance

Annuities:
Annuity Contracts

RELATIONSHIPS

Matrimony:
Marriage License

Divorce:
Divorce Paperwork

Adoption:
Adoption Paperwork

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WHAT YOUR LOVED ONES NEED TO KNOW WHEN YOU CAN'T TELL THEM

ESTATE PLANNING
ESSENTIALS

Will & Trust

Use this page for important notes about your estate planning documents.

What documents do you have in place?

- [ ] Will
- [ ] Revocable Trust
- [ ] ILIT
- [ ] PoA Financial
- [ ] PoA Medical
- [ ] Physicians Directive

Attorney name and contact information:

Date on documents:

Location of original documents:

Location of copies:

ESTATE PLANNING
ESSENTIALS

Letters of Instruction

An easy-to-understand explanation of your overall estate plan to your executor. It lays out your wishes to your family for things not covered by the will. It has no legal authority.

Estate Executor name and contact information:

Digital Asset Executor name and contact information:

Advisors to call immediately: Name, Relationship, Telephone Number

List of Family & Friends: Name, Relationship, Telephone Number

Personal Letters to children, friends and family

Final Remains: Have you contracted with a funeral home, cremation provider, or green funeral provider? Name and Contact:

ESTATE PLANNING
ESSENTIALS

Identity Documents

These documents may be needed soon after your death; Store copies here.

Copy of:

Birth Certificate, Social Security Card

Passwords

Passwords needed readily:

Phone

Computer

Digital Estate Planning

Digital assets and online account access are a new and important part of planning. For more on this, please see *"How to Create Your Digital Estate Plan".*

PROOF OF
OWNERSHIP

Proof of Ownership

Use this page to gather documents and data to show proof of ownership.

Deeds:
Real Estate, Land, Cemetery

Mortgage:
Mortgage Info – Note the lender and account number

Proof of:
Loans made, Debts owed

Cars:
Vehicle titles, etc

Operating Agreements:
Business Partnerships, Corporate Agreements

Tax Documents:
Returns for the last 2-4 years

Investments:
Brokerage Accounts (list institution and account number),
Stock Certificates if old certificates are held

BANK
ACCOUNTS

Bank Accounts

List of Bank Accounts – including how they are titled; Joint, Trust, etc.

List of Bank Accounts – Including how they are titled; Joint, Trust, etc.

Location of all Bank Logins:

List of Safe Deposit Boxes – Note location of key:

MEDICAL

Medical History

Personal, Family, Pets

Physician's name and contact information:

MyCharts access username and password:

Your pet's veterinarian name and telephone number:

Living Will or Advanced Health Care Directive

Health Care Power of Attorney name and telephone number:

DNR and POLST form copies:

INSURANCE & RETIREMENT

Insurance & Retirement

It is important to have copies of policies and contracts and to review beneficiaries regularly.

Insurance Policies & Contracts:
Life, Long Term Care, Disability, Property

Annuities:
Annuity Contracts

Account & Beneficiary Information:
IRA , Roth IRA, 401k, Life Insurance (List account and beneficiary name)

RELATIONSHIPS

Relationships

Include copies of these documents for reference and store the originals for safekeeping.

Matrimony:
Marriage certificate

Divorce:
Divorce decree

Adoption:
Adoption certificate