

GUARDING YOUR LEGACY

Checklist



**MCPerson
Financial
Group**

GUARDING YOUR LEGACY

In today's world, our lives are constantly evolving from one phase to the next — a new job, buying a house, getting married, having kids, and creating a retirement plan. Once more, all of these events are documented. These documents are often misplaced or forgotten about until you need them most. Wouldn't it be nice if you never had to worry about losing or finding them ever again?

We designed the Guarding Your Legacy Checklist to organize and store all of your vital documents. This checklist provides added peace of mind by helping reduce the stress associated with trying to find a piece of paper that you stored away 15 years ago.

We encourage you to share the Guarding Your Legacy Checklist with your family, financial professional, attorney, accountant, and executor. This way, everyone will know exactly where to find information pertinent to your future.

With the Guarding Your Legacy Checklist, you can have added peace of mind knowing that your family will have your future wishes in one easily accessible location.



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If you need assistance completing this document, we are more than happy to help. Please consult your attorney and/or certified public accountant regarding any legal or tax matters in this document.

IMPORTANT CONTACTS	NAME	PHONE NUMBER
Financial Professional		
CPA/Accountant		
Insurance Agent		
Attorney		
Executor of Estate		

EMERGENCY PAPERS and/or INFORMATION	LOCATION
✓ GENERAL ITEMS	
Birth certificate	
Social Security card	
Passport/certificate of citizenship (naturalization papers)	
Driver's license number and expiration date	
Adoption papers	
Marriage certificate	
Prenuptial agreement	
Divorce or separation papers	
Safe deposit box(es) and keys	
Safe and combination	
✓ INVESTMENT DOCUMENTS	
Brokerage account statements	
Mutual fund account statements	
Annuity account statements	
Individual retirement plan statements	
Company retirement plan statements	
Other company benefits (e.g., deferred compensation)	
Stock certificates not held in an account	

EMERGENCY PAPERS and/or INFORMATION		LOCATION
✓	INVESTMENT DOCUMENTS CONTINUED	
	Bearer bonds not held in an account	
	Alternative investment documents (including K-1s)	
	Investment club documents/records	
	529 college savings plan statements	
	Online securities access information	
	Beneficiary forms for IRAs, 401(k)s, or other benefits plans	
	Documents showing cost basis of securities owned or sold	
✓	INSURANCE DOCUMENTS	
	Life insurance policy documents	
	Group life policies	
	Health and accident insurance ID cards and claim records	
	Variable annuity or fixed annuity statements/documents	
	Mortgage insurance policy	
	Travel insurance policy	
	Property and casualty policy documents	
	Veterans administration insurance papers	
	Beneficiary forms for insurance or annuity policies	
	Long-term care insurance policy	
✓	PERSONAL FINANCE DOCUMENTS	
	Appraisals for valuable items	
	Inventory of valuable items	
	Buy/sell or partnership agreements	
	Deferred compensation agreements	
	Federal/state gift tax returns	
	Prior years' tax returns	
	Motor vehicle title and/or registration papers	

EMERGENCY PAPERS and/or INFORMATION		LOCATION
✓	PERSONAL FINANCE DOCUMENTS CONTINUED	
	Lawsuit paperwork or documents on pending legal actions	
	Promissory notes	
	Outstanding loans	
	Mortgage documents	
	Medical bills/records and prescription plan card	
	Property and school tax records	
	Real estate deeds and/or other titles of ownership	
	Rental and/or lease agreements	
	Trust documents/agreements	
✓	BANK/CREDIT DOCUMENTS	
	Checking or money market account statements	
	Checks	
	Savings accounts	
	Credit cards and account statements	
	Life insurance policy documents	
	Credit union account books or statements	
✓	EMERGENCY DOCUMENTS	
	Living will/health care proxy	
	Durable power of attorney	
	Financial institution's power of attorney forms <i>Some financial institutions may refuse to accept a standard power of attorney.</i>	

	PAPERWORK FOR FINAL ARRANGEMENTS	LOCATION
	Last will and testament <i>Wills should not be kept in a safe deposit box. Rather, wills should be stored in either a lawyer's will safe or a fireproof safe at your home.</i>	
	Military discharge papers <i>Veterans receive a small stipend toward burial expenses.</i>	
	Burial instructions	
	Cemetery plot deed	
	Prepaid cremation documents	
	Funeral home preference and information	
	Charitable donations preference(s)	
	Letter of instruction (if available) from the deceased to the executor	
	Death certificate <i>The number of accounts or titles of ownership of the deceased.</i>	
	Phone number/address of the county surrogate court <i>The county court or clerk's office where the decedent resided will oversee estate matters and probate. The executor must obtain a sufficient number of death certificates for transferring ownership of accounts, titles, etc.</i>	



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Please contact us if you have any questions at: **321.253.2016** or **arthur@mcpersonfinancialgroup.com**.

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