



The **ORGANIZED**  
**INVESTOR**  
Workbook

**Preview**

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## ***If You Have Stuff... You Need to get Organized***

Since the mortality rate in the U.S. continues to hover around 100%, leaving this earth is a reality that is hard to avoid. And with your passing means your STUFF will be left behind. In the words of financial writer, Jane Bryant Quinn...

1. You own stuff
2. You will die
3. Someone will get that stuff

Who will get your stuff, and what will happen to your family will be beyond your control, once you're on "the other side". And as long as you're still on "this side", there's still time to get your affairs in order.

To help... we can work closely with your current Trusted Advisors, and/or introduce you some we know. Having good communication between these professionals is a much more efficient way to manage your wealth, both Now, and after your passing.



## 7 Resources for Organizing Your Affairs

To help you with the task of organizing your affairs, we have many resources to help you move forward. These were created and are offered exclusively by Goodman & Hubbard<sup>2</sup> in Knoxville. They're available without cost or obligation, however they DO require an investment of some time.

1. **TN Organized Investor Workshop:** (offered without cost or obligation)
  - a. Study / Reference Materials: Received by attendees
    - i. **The Organized Investor Workbook** (in a 3-ring binder)
    - ii. **The Organized Investor Step-2 Checklist**
    - iii. **The Organized Investor Step-2 Profile**
    - iv. **The Widow's Digest** (If requested)
2. **The Organized Investor Workbook** (Provided at our Organized Investor Workshop without cost or obligation).
  - a. **Organizing Your Estate:** 25 Topics - Important documents, tips, professional help, etc.
  - b. **Organizing Your Retirement & Taxes:** 25 Topics
  - c. **Documentation:** Information your family may need to know (*see page 30*).
3. **Consultation:** (offered without cost or obligation)
  - a. Discussion about your situation, goals, questions and your level of need for professional help.
  - b. Working with your current attorney or with one of your choosing from a list of at least three.
4. **Implementation:** (offered without cost or obligation)
  - a. Execution of estate planning documents (in conjunction with your attorney)
  - b. Account consolidation, asset retitling, beneficiary designations, funding of trusts, etc.
5. **Website:** [www.TheOrganizedInvestor.com](http://www.TheOrganizedInvestor.com)
  - a. Videos and links on Organizing your Investments, your Retirement & your Affairs.
  - b. Schedule of upcoming Public workshops and how to schedule a Private event workshop
6. **The Organized Investor Checklist:** (50 Topics used in the workshop setting)
  - a. Used to identify what you need to have done and its level of importance
  - b. Used to evaluate the level of professional help you may need
7. **The Organized Investor Step-2 Profile:** (used in the workshop setting) Designed to help summarize information about your family to help facilitate creating a summary you can provide to a local estate planning attorney who can assist you by preparing estate planning documents.
8. **The Widow's Digest:** (offered without cost or obligation and written by Jerry Goodman)
  - a. An estate SETTLEMENT book for a large number of counties in East Tennessee.
  - b. Topics include What to Do, Where to Go, and Things To Remember

For those who need some help getting started, we host the Organized Investor Workshop that can be attended at either a public setting or at a private event arranged for an employer, a residential community, or any other associated group of people. These events can be attended or scheduled without cost or obligation and attendees receive the study and reference materials outlined. More information about scheduled future public events or how to schedule a private event can be found at [www.TheOrganizedInvestor.com](http://www.TheOrganizedInvestor.com).

## Step-2 Checklist & Step-2 Profile

Similar to what is used in the emergency room or by medics on the battlefield, the **Step-2 Checklist** is to be used at the workshop to determine where to focus attention based upon what is most important to you. Another benefit of this checklist, is to help you evaluate just how much legal help you may need to address all your concerns. For example, taking a Do-It-Yourself approach with an on-line legal website may not be the best option if you have a long list of complex issues on this sheet.

The **Step-2 Profile** is to summarize the information about your family to help facilitate creating a summary you can provide to a local estate-planning attorney who can assist you with your Estate Planning documents.

After these are completed at the Workshop... we ask you to give us the top copy to help us understand what your concerns are and give us some feedback about the information we cover. The other two sheets are provided so that a couple can each have a copy for reference and for comparing what is important for EACH person... and to decide which of these issues they want to address first.

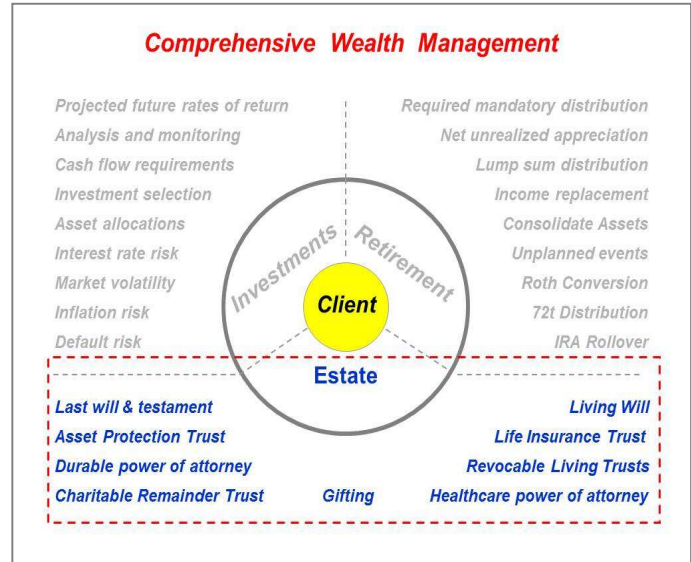
**Let's Discuss Your Questions and Concerns:** One of things we can do is to have a chat with you about what's on your list, talk through options and determine what may make sense for your situation. Keep in mind that we are not attorneys and are unable to give you legal advice. What we CAN give you is INFORMATION to help you make an informed decision for YOUR situation.

We don't charge anything for conducting these workshops, for the materials provided, for a face-to-face meeting, and we don't receive ANY type of compensation related to you getting your estate planning documents in order. We can assist you in working with your personal attorney, if you have one, or we can offer names of three estate planning attorneys – and you can choose one of those if you prefer.

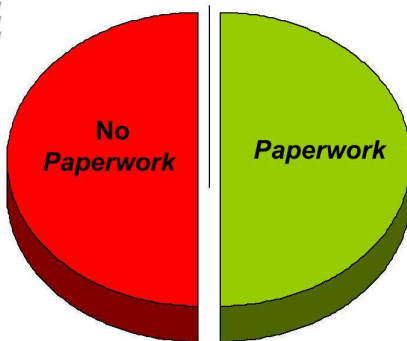
**Organizing Your Estate:** Getting organized is a journey, not a destination because even if everything is in order today... things change.

And because the collective number of issues we're faced with are pretty overwhelming... it's a little easier to divide them into three categories - *Organizing Your Investments, Organizing Your Retirement and Organizing Your Estate.*

Unfortunately...it's not possible in this material to cover every issue you need to address, much less try to give you some guidance about what to do. So the focus here is to cover these 3 topics by spending some time on a large number of issues in order to highlight what is important, where you need to focus your attention, and provide a starting point for what you need to do going forward.

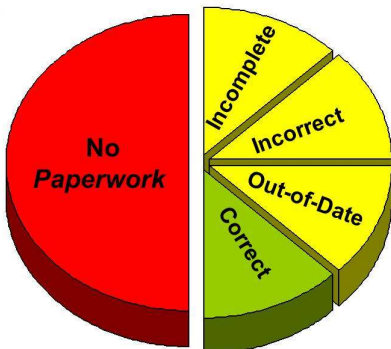


## Organizing Your Estate



The whole topic of Organizing Your Estate is that area that most people don't like to think about. They don't want to talk about dying and what will happen to their families after they're gone. It's an easy thing to ignore...in fact, there are estimates that about half of society doesn't even have a valid Will, and based upon our experience... that's pretty accurate.

## Organizing Your Estate



And what may be even *MORE* surprising is that even for the group that *HAS* done some planning... much of that may be incomplete, incorrect, or perhaps just out-of-date. In fact, some people are not even sure where their documents are located.