

Legacy *Checklist*

A legacy checklist helps you organize vital documents and personal information, making it easier for beneficiaries to find them and manage your affairs after your passing.

Too often we see the stress and frustration beneficiaries go through when trying to manage the post life affairs of their loved ones. It's already an emotional and challenging time. Having to search for vital documents and personal information can be extremely stressful when you just want to grieve with family. It breaks our hearts to see this happen when a little pre-planning would help a lot.

Our wish with this Checklist is to help offer some peace of mind for you, and reduce some of the stress for your beneficiaries after your passing. Once completed, you may wish to share it directly with your family or keep it in a secure place for them to find.



provided courtesy of:
Willowbranch Financial Group

Legacy Checklist

Full Legal Name _____ Updated on _____

Complete the checklist with contact information and the locations of your important documents. Not all will be applicable.
Examples of locations may include: File cabinet; Computer; Safe; Lock box; etc.

✓	IMPORTANT CONTACTS	NAME	PHONE NUMBER
	Financial Advisor	Brad Paul, Willowbranch Financial	717-461-7828
	Accountant /Certified Public Accountant (CPA)		
	Insurance Agent		
	Attorney		
	Executor of Estate		
	Employer		

EMERGENCY PAPERS AND/OR INFORMATION

✓	GENERAL ITEMS	Location
	Birth Certificate	
	Social Security Card	
	Passport/Citizenship (naturalization papers)	
	Driver's License number and expiration date	
	Adoption papers	
	Marriage Certificate	
	Pre-nuptial agreement	
	Divorce or separation papers	
	Safe Deposit Box(es) and keys	
	Complete "Confidential Information" <i>List of account and device passwords*</i>	

**Separate Document completed with Username/Passwords & important information add * to indicate information saved.*

✓	INVESTMENT DOCUMENTS	Location
	Brokerage account statements	
	Mutual fund account statements	
	Annuity account statements	
	Individual retirement plan statements	
	Company retirement plan statements	
	Other Company benefits (deferred compensation)	
	Stock certificates not held in an account	
	Bearer bonds not held in an account	
	Alternative investment documents (including K-1s)	
	Investment club documents/records	
	529 college savings plan statements	
	On-line 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	Location
	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	
	Life insurance policy documents	
	Medical insurance policy documents	

Keep Safe

*Once completed, you may wish to share it directly with your family or keep it in a secure place for them to find.

✓	PERSONAL FINANCIAL DOCUMENTS	Location
	Appraisals for valuable items	
	Inventory of valuable items	
	Buy/sell or partnership agreements	
	Federal/state gift-tax returns	
	Prior years' tax returns	
	Motor vehicle title and/or registration papers	
	Lawsuit or documents on pending legal actions	
	Promissory notes	
	Outstanding loans	
	Mortgage documents	
	Medical bills/records, 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	Location
	Checking or money market account statements	
	Checks	
	Savings accounts	
	Credit cards and account statements	
	Credit union account books or statements	
✓	EMERGENCY DOCUMENTS	Location
	Living Will/Health Care Proxy	
	Durable Power of Attorney	
	Financial institution's proprietary Power of Attorney forms <i>Some financial institutions may refuse to accept a standard Power of Attorney</i>	

FINAL ARRANGEMENTS

✓	PAPERWORK FOR FINAL ARRANGEMENTS	Location
	Last Will and Testament (<i>Don't store in Safe Deposit Box. Keep at Attorney's office 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	
	Pre-paid cremation documents	
	Funeral home preference and information	
	Charitable donations preferences(s)	
	Letter of Instruction to Executor	
	Death Certificate <i>The number of accounts or titles of ownership of the deceased</i>	
	Phone number/address of County Surrogate Court <i>The county court or clerk's office where the decedent resided will handle/ oversee estate matters and probate. The executor must obtain a sufficient number of death certificates for transferring ownership of accounts, titles, etc.</i>	
	Information for obituaries (resume/life story/biography, etc.)	



