

Life & Legacy Planning Checklist

The most important plan of your life.

Getting Started

Here is a checklist of some of the essential documents, accounts, and types of information you should organize and have at the ready before starting your planning.

INSURANCE INFO

- Life Insurance
- Home Insurance
- Funeral Insurance
- Other Insurance Policies (Example: Umbrella, Personal Articles)
- Health Insurance
- Renters Insurance
- Disability Insurance
- Car Insurance
- Long-Term Care Insurance
- Disaster Insurance

BANK ACCOUNTS / MORTGAGE / LOANS

Have a recent account statement for each, location of related items (example: checkbooks, passbooks), and account/login and password for online management.

- Checking
- Money Market
- Mortgage Info
- Other (Example: Debit Card, Promissory Note):
- Savings
- Certificate Of Deposit (CDs)
- Loan Info

CREDIT CARDS

Have a recent account statement for each account and login/password for online management.

- American Express Last 4 Digits: _____ Exp. Date: _____
- Discover Last 4 Digits: _____ Exp. Date: _____
- Mastercard Last 4 Digits: _____ Exp. Date: _____
- Visa Last 4 Digits: _____ Exp. Date: _____
- Other:



INVESTMENTS / PENSIONS / BENEFITS

Have a recent account statement for each account & current login and password for online management.

- | | |
|--|--|
| <input type="checkbox"/> Stocks | <input type="checkbox"/> Bonds |
| <input type="checkbox"/> Mutual Funds | <input type="checkbox"/> Military Benefits |
| <input type="checkbox"/> 401(k) | <input type="checkbox"/> 403(b) |
| <input type="checkbox"/> IRA | <input type="checkbox"/> Roth IRA |
| <input type="checkbox"/> Pension (SEP / SARSEP) | <input type="checkbox"/> 529/College Savings |
| <input type="checkbox"/> Other (Example: Trust Fund, Specific Employee Benefits) | |

PROPERTY DEEDS / TITLES

- | | |
|--|--|
| <input type="checkbox"/> Real Estate (owned) | <input type="checkbox"/> Real Estate (rented/leased) |
| <input type="checkbox"/> Motor Vehicles | <input type="checkbox"/> Boats |
| <input type="checkbox"/> Other | |

UNLOCKING ELECTRONICS / SECURITY

This is to ensure someone you trust knows how to access the following. Have current login & password.

- | | |
|--|---|
| <input type="checkbox"/> Mobile Phone | <input type="checkbox"/> Password Manager |
| <input type="checkbox"/> Home Security | <input type="checkbox"/> Tablet |
| <input type="checkbox"/> Computer(s) | <input type="checkbox"/> Wi-Fi |
| <input type="checkbox"/> Other | |

DIGITAL ACCOUNTS / SERVICES

Be prepared to identify all of the following digital accounts and services you use.

- | | |
|--|---|
| <input type="checkbox"/> Email | <input type="checkbox"/> Entertainment (Video / Music / Gaming) |
| <input type="checkbox"/> Cloud Storage | <input type="checkbox"/> Food / Delivery |
| <input type="checkbox"/> Health / Medical (medication) | <input type="checkbox"/> Messaging / Voice-over-IP |
| <input type="checkbox"/> Money Management | <input type="checkbox"/> Shopping |
| <input type="checkbox"/> Social Media | <input type="checkbox"/> Software Licenses |
| <input type="checkbox"/> Travel / Ticketing | <input type="checkbox"/> Web Hosting / Blogging |
| <input type="checkbox"/> Other (Example: Photography, Organization, Productivity...) | |

