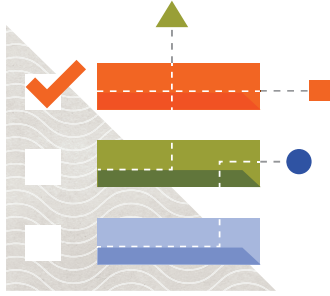


WEALTH PLANNING

Planning For End Of Life: A Checklist



Your inclusive wealth plan incorporates all facets of your wealth management needs. Our dedicated planning team works collaboratively with you to select and implement strategies that address your unique situation today and prepare you for life's transitions.

Wondering where to start?

A complete plan includes a will, trusts, and key legal documents, such as powers of attorney for financial and health care matters, and requires advance thought on what you would like to have happen if life takes a surprising turn. Being prepared for unexpected events—and even just the natural course of life—can make a big difference to your family and heirs. This checklist can help you plan and make important arrangements in advance. In addition to having these items prepared, you should also have documentation for each of these items compiled in an accessible location that you have shared with a trusted friend, family member, or advisor.

Immediate

- Preplanned funeral arrangements, cremation plans, cemetery and burial plot selections

List of people/companies to contact

- Immediate family, close friends
- Anyone named in your will
- Beneficiaries of your IRA, annuity, life insurance, etc.
- Your attorney, executor, trustee, accountant/CPA, CFP, insurance agent(s)
- Landlords, tenants, employers, employees
- Utility companies: gas, electric, water, phone, internet, TV, etc.

Major documents

- Durable power of attorney
- Will
- Health care power of attorney, proxy, advance directive
- Birth certificate, social security card
- Marriage, domestic partnership, divorce documents

Assets and liabilities

- Real estate deeds, mortgages, vehicle titles
- Checking, savings accounts (PIN), investment accounts
- Life insurance, viatical

Continued

Assets and liabilities (continued)

- Pension/retirement benefits
- Outstanding loans, credit cards
- Location of safe deposit box and keys

List of digital assets

- Computer and mobile devices, electronic storage devices: external hard drive, thumb drive, SD card
- Online account log-ins, passwords, security questions, associated mobile numbers and recovery email addresses, email, social media, cloud services, banking, bill pay, etc.

Optional documents

- Narrative on how survivor “could” utilize leftover assets (or instructions on specialized account maintenance needs)
- List of tangible assets and who gets what

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