



## Considerations Checklist

### Important Contacts:

Attorney: \_\_\_\_\_  
 CPA: \_\_\_\_\_  
 Investments: \_\_\_\_\_  
 Banking: \_\_\_\_\_  
 Insurance: \_\_\_\_\_  
 Family: \_\_\_\_\_

### Important Documents:

**\*\*Location, who drafted and who has copies. Add phone #s.**

Will: \_\_\_\_\_  
 Trust: \_\_\_\_\_  
 Power of Attorney: \_\_\_\_\_  
 Healthcare DPOA: \_\_\_\_\_

### Assets (attach a separate page if necessary):

Investment/Retirement Accounts: \_\_\_\_\_  
 Charitable Accounts (i.e. DAF): \_\_\_\_\_  
 Home Title (how listed): \_\_\_\_\_  
 Safety Deposit Box/Safe (key location): \_\_\_\_\_  
 Automobiles: \_\_\_\_\_  
 Home Inventory (mobile video/uploaded where): \_\_\_\_\_  
 Artwork/Jewelry: \_\_\_\_\_  
 Debt (mortgage, HELOC, credit cards, LLC): \_\_\_\_\_  
 Other assets (real estate, LP, stock certificates, etc...): \_\_\_\_\_

### Insurance:

**\*\*Know your policies, coverage, and how paid.**

Health: \_\_\_\_\_  
 Life: \_\_\_\_\_  
 Disability: \_\_\_\_\_  
 LTC: \_\_\_\_\_  
 Casualty: \_\_\_\_\_  
 Auto: \_\_\_\_\_  
 Umbrella: \_\_\_\_\_

### Expenses (attach a separate page if necessary):

**\*\*Know your expenses, and how they are paid (online, quicken, which are on autopay).**

Monthly Expenses: \_\_\_\_\_  
 \_\_\_\_\_



**Income Sources:**

Social Security: \_\_\_\_\_  
Investment Income: \_\_\_\_\_  
W-2: \_\_\_\_\_  
K-1: \_\_\_\_\_  
1099: \_\_\_\_\_  
Pensions (receiving now): \_\_\_\_\_

**Benefits Information:**

**\*\*Know all benefits and what is due to survivors. Check beneficiary designations, especially on retirement accounts and insurance.**

Employee Plans: \_\_\_\_\_  
Co. Paid Life Insurance: \_\_\_\_\_  
Deferred Comp. Plans: \_\_\_\_\_  
Disability: \_\_\_\_\_  
Pension/Retirement (future): \_\_\_\_\_  
Veterans: \_\_\_\_\_

**Online Information:**

Account Logins: \_\_\_\_\_  
Computer Passwords: \_\_\_\_\_  
Password Keeper (Which one/Login): \_\_\_\_\_  
Dropbox/Drive: \_\_\_\_\_

**Credit Cards:**

**\*\*Know which cards your family has and how to access. Good to have list in case of lost purse or wallet.**

Cards: \_\_\_\_\_  
\_\_\_\_\_

**Taxes:**

**\*\*Know where copies of the previous years are filed**

Year and Location: \_\_\_\_\_  
Year and Location: \_\_\_\_\_

**Special Circumstances:**

**\*\*Considerations when completing checklist and talking to your professional**

Divorce: \_\_\_\_\_  
Inheritance: \_\_\_\_\_  
Separate Property: \_\_\_\_\_  
Special Needs: \_\_\_\_\_