



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: _____