



How prepared are you if the unthinkable were to happen to you or your spouse? Being prepared for the “business” part of things will help ease your mind after a tragedy. Below is a list of things you can do in advance to make sure all your affairs are in order to help support your spouse or family:

1. Be knowledgeable about all of your financial affairs
 - a. Credit Cards
 - b. Bank Accounts
 - c. Investment Accounts
 - d. Home Loans
 - e. Car Loans
 - f. Medical Bills
 - g. Retirement Plans
 - h. Tax Returns
2. Prepare Estate Documents
 - a. Last Will and Testament
 - b. General Durable Power of Attorney
 - c. Declaration as to Medical or Surgical Treatment (Living Will)
 - d. Medical Durable Power of Attorney
 - e. Appointment and Designation of Guardian
 - f. Declaration of Disposition of Last Remains
3. Know where your identification documents are located
 - a. Birth Certificates
 - b. Passports
 - c. Marriage License
 - d. Social Security Cards
 - e. Death Certificates
4. Know your insurance information
 - a. Policies and policy numbers for: life, health, disability, car, homeowner, etc.
5. Know where your Resident/Property documents are located
 - a. Deed
 - b. Mortgage Information
6. Know where your auto documents are located
 - a. Car Title
 - b. Loan Information
7. Create a list of your monthly bills and when payments are due
8. Create a list of accounts and passwords
 - a. Online Bill Accounts
 - b. Social Media Accounts

- c. Bank Accounts
 - d. Email Accounts
 - e. Shopping Accounts
 - f. Entertainment Accounts
9. Create a list of important “Need to Knows” at home
- a. Where are your security safes, keys and or code located?
 - b. What are your alarm and garage codes?
 - c. Where are your keys located?
 - d. What are your watering days?
 - e. What is your pet information?