

SEVEN MUST-HAVES FOR "SOMEDAY"

Do you have important documents on hand in case of a life-changing event? Would your family know who to contact in the event of your death? Here are seven must-haves to be prepared for someday.

1. KEY CONTACTS

- Executor/Personal Representative
- Family/Friends/Neighbors

NAME

PHONE NUMBER

_____	_____
_____	_____
_____	_____
_____	_____

2. KEY DIRECTIVE DOCUMENTS

- Power of Attorney (Health & Finances)
- Health Care Directive/Living Will
- Will and Living Trust

LOCATION

3. ADVISORS

- Attorney
- Financial Planner
- Spiritual Leader

NAME

PHONE NUMBER

_____	_____
_____	_____
_____	_____

4. INVESTMENT RECORDS

- Investments
- Retirement
- Social Security Benefits

LOCATION

5. SAFE DEPOSIT BOX

- Location of Key and Contents

LOCATION

6. PERSONAL LETTER OF WISHES

- Burial Plot Deed
- Funeral Plan
- Spiritual Wishes

LOCATION

7. BANK RECORDS

- Bank Statement and Account Numbers

BANK

ACCOUNT NUMBER

_____	_____
_____	_____
_____	_____
_____	_____