

The 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



2. Key Directive Documents

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



3. Advisors

- Attorney
- Financial Planner
- Spiritual Leader



4. Investment Records

- Investments
- Retirement
- Social Security Benefits



5. Safe Deposit Box

- Location of Key and Contents



6. Personal Letter of Wishes

- Burial Plot Deed
- Funeral Plan
- Spiritual Wishes



7. Bank Records

- Bank Statement and Account Numbers