

# PREPARING FOR TOMORROW CHECKLIST

Life moves quickly. Everyone is busy with something. You've worked hard to build for your family. Now take time to make sure your affairs are in order.

Every year or two, verify that your beneficiaries are correct. In most cases you will have the option of a Primary Beneficiary and a Secondary Beneficiary (also known as Contingent Beneficiary). The Primary Beneficiary will be the first to receive your death benefit. If the Primary Beneficiary passes away before you, the Secondary Beneficiary is next in line.

## Bank/Financial

- Savings Account
- Checking Account
- Money Market
- CD's
- Lockbox

## Retirement

- 401K
- 403B
- IRA
- SEP
- Pension
- Stocks

## Insurance

- Life Insurance
- Annuities

## Property

- Automobiles
- Real Estate

## Legal

- LLC/Corporations
- Will
- Trust

# PREPARING FOR TOMORROW

## SIMPLIFY THE DETAILS

Complete the following information as fully and accurately as possible. Remember to periodically review and update this information and keep a copy in a safe place, such as a safe deposit box or fireproof, waterproof home safe or filing cabinet.

### Personal Information

Name: \_\_\_\_\_  
Date of birth: \_\_\_\_\_  
Date of death: \_\_\_\_\_  
Place of death: \_\_\_\_\_  
Death certificate number: \_\_\_\_\_  
Social Security number: \_\_\_\_\_  
Military service number: \_\_\_\_\_  
Veterans Adm. claims number: \_\_\_\_\_

### Life & Health Insurance Policies

Company	Policy Number
_____	_____
_____	_____
_____	_____

### Beneficiary(s) Information

Name	Policy Number
_____	_____
_____	_____
_____	_____

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## SIMPLIFY THE DETAILS

### Location of Important Items

- Safe deposit box: \_\_\_\_\_
- Safe deposit box key: \_\_\_\_\_
- Funeral instructions: \_\_\_\_\_
- Place of interment: \_\_\_\_\_
- Deed to cemetery plot: \_\_\_\_\_
- Will: \_\_\_\_\_
- Trust agreement: \_\_\_\_\_
- Death certificate: \_\_\_\_\_
- Birth certificate: \_\_\_\_\_
- Marriage certificate: \_\_\_\_\_
- Divorce records: \_\_\_\_\_
- Insurance policies: \_\_\_\_\_
- Naturalization papers: \_\_\_\_\_
- Adoption papers: \_\_\_\_\_
- Mortgages, deeds: \_\_\_\_\_
- Credit union records: \_\_\_\_\_
- Social Security card: \_\_\_\_\_
- Military service records: \_\_\_\_\_
- Civil service employment records: \_\_\_\_\_
- Securities, stocks, & bonds: \_\_\_\_\_
- Automobile titles, registrations: \_\_\_\_\_
- Business agreements: \_\_\_\_\_
- Notes payable: \_\_\_\_\_
- Notes receivable: \_\_\_\_\_
- Other loan papers: \_\_\_\_\_
- Tax returns for prior years: \_\_\_\_\_
- Credit cards: \_\_\_\_\_
- Important correspondence: \_\_\_\_\_

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## SIMPLIFY THE DETAILS

### Names & Contact Info of Advisers

Life insurance agent: \_\_\_\_\_

Auto, home insurance agent: \_\_\_\_\_

Clergy: \_\_\_\_\_

Funeral director: \_\_\_\_\_

Executor or administrator: \_\_\_\_\_

Attorney: \_\_\_\_\_

Accountant: \_\_\_\_\_

Trust officer: \_\_\_\_\_

Investment broker: \_\_\_\_\_

### Other Sources of Benefits

Employer: \_\_\_\_\_

Union officer: \_\_\_\_\_

Fraternal organization: \_\_\_\_\_

Credit life insurance: \_\_\_\_\_

### Names, Contact Info, & Birth Dates of Dependents

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