

30 Documents

YOU NEED BEFORE YOU DIE

Help ensure your family avoids confusion and financial stress by preparing these 30 useful documents.



THE BASICS

- Will
- Letter of instruction
- Trust documents
- List of all usernames and passwords
- Peace of Mind Checklist

ASSETS & OWNERSHIP

- Housing, land and cemetery deeds
- Escrow mortgage accounts
- Proof of loans made and debts owed
- Vehicle titles
- Stock certificates
- Savings bonds
- Partnership and corporate operating agreements
- Tax returns
- Durable power of attorney for assets

BANKING & INVESTMENTS

- List of bank accounts
- Safe-deposit box information
- List of brokerage accounts

RETIREMENT PLANNING & INSURANCE

- Life insurance policies
- Pension documents
- 401(k) accounts
- Individual retirement accounts
- Annuity contracts

HEALTH RECORDS

- Personal and family medical history
- Do-not-resuscitate order
- Living will
- Authorization to release health care information
- Durable health care power of attorney

RELATIONSHIPS

- Marriage license
- Divorce papers
- Guardianship/adoption papers

ON YOUR GUARD.

PLANNING FOR RETIREMENT CAN BE
UNSETTLING. YOU WANT TO MAKE
THE RIGHT DECISIONS FOR YOU AND
YOUR FAMILY, BUT WITH SO MANY
OPTIONS AND SO MANY NEEDS TO
CONSIDER, IT'S OFTEN NOT CLEAR
WHAT THE RIGHT ANSWERS ARE.

Investment Answers is here to advocate for you, your family and your hopes for the future.

*Explore your investment options at InvestmentAnswers.net, and get in touch with our
experienced advisors to start safeguarding what you've worked so hard to build.*

WORKS CITED

25 Documents You Need Before You Die: <http://online.wsj.com/news/articles/SB10001424052702303627104576410234039258092>

Four Estate-Planning Documents Everyone Should Have: <http://online.wsj.com/articles/SB10001424052702304572204579503983567868234>

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