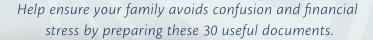
30 Documents YOU NEED BEFORE YOU DIE





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

Investment Answers LLC is a Financial Advisory firm. Investment Advisory Services offered by Investment Answers Capital LLC. For the most updated Registered Investment Advisory disclaimer, please visit our website at www.InvestmentAnswers.net. This information is intended for entertainment or educational purposes only. Opinions, rules, regulations and laws expressed are subject to change without notice and are not intended as individualized investment or tax advice. Past performance does not predict or guarantee future results. All information is believed to be from reliable sources; however, we make no representation as to its completeness or accuracy. These are the general views and understandings of Investment Answers, LLC, and should not be construed as personalized investment or tax advice. Consult a qualified financial professional before making any financial decision. 12.9.14

