

20 THINGS YOUR FAMILY SHOULD KNOW

An important part of estate planning is organizing your affairs, so that if you become disabled or die, the difficult tasks facing your family and friends will be simpler and less costly. By providing these details to your family, you will leave them a map, not a mess.

1. My attorney's name, address and phone number.
2. My accountant's name, address and phone number
3. My financial planner and stockbroker's names, addresses and phone numbers
4. My insurance agent(s)' names, addresses and phone numbers.
5. My physician's name, address and phone number, as well as lists of medications.
6. Social security, VA, PERA or railroad retirement numbers; citizenship papers.
7. Credit card companies and account numbers.
8. Insurance companies and policy numbers: life, medical, health, disability, homeowner's, long term care, vehicle and mortgage, etc.
9. Pension, IRA and qualified retirement plan administrators and account numbers.
10. Checking, savings account and safe deposit box locations and account numbers.
11. Stock, bond, mutual fund and CD locations and account numbers
12. Passwords and user names for computers, key websites, blackberries and personal digital assistants, cell phones, pagers and voicemail services, social media and other internet subscriptions.
13. Real estate and condo addresses.
14. Description of business and investment interests.
15. Description of debts others owe me.
16. Description of debts owed other than normal monthly bills; divorce obligations.
17. Location of will, codicil, trust, living will, marital agreement and power(s) of attorney documents.
18. Directions regarding burial, cremation, funeral and other disposition of last remains. You may want to include charitable donation information and wishes.
19. Location of other important paperwork—social security cards, marriage license, birth certificates, tax returns, etc.
20. Mortuary and hospice preferences.

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