





Getting Your Ducks in a Row: Documents Adults Need

While we firmly believe life is meant to be lived, we also know that it’s important to have peace of mind in the event of an emergency. We’ve put together a detailed checklist to help you organize your life.

Top 4 Important Documents Adults Need but Don’t Have:

<div>A WILL</div> <div><p>AKA: Last Will & Testament</p><p>-</p><p>A will essentially states: when I die, here’s what I want to happen.</p></div>	<div><div>A LIVING WILL</div><div><p>AKA: An advance directive</p><p>-</p><p>In this document, you’ll declare your wishes for end-of-life care.</p></div></div>	<div><div>DURABLE HEALTH CARE POWER OF ATTORNEY</div><div><p>AKA: A health care proxy</p><p>-</p><p>In the event that you can’t make your own health care decisions, you need to have someone you trust like a family member or friend.</p></div></div>	<div><div>DURABLE FINANCIAL POWER OF ATTORNEY</div><div><p>AKA: An attorney-in-fact or agent</p><p>-</p><p>This document outlines who you want to make financial decisions if you can’t make them for yourself.</p></div></div>
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<div><div>CRITICAL DOCUMENTS</div><div>Locate and safely store the following items:</div><div><div><div>Official Documents:</div><ul style="list-style-type: none">Power of AttorneyWill & Living WillTrusts<div>Identification:</div><ul style="list-style-type: none">Birth CertificateDriver’s LicenseSocial Security CardPassportArmed Forces ID / Discharge PapersCitizenshipDocumentationMarriage CertificateDivorce Decree / Settlement Info</div><div><div>Insurance Info:</div><ul style="list-style-type: none">Life InsuranceHealth InsuranceCar InsuranceHome/Renters InsuranceFuneral InsuranceDisability Insurance</div></div></div>	<div><div>ACCOUNT INFO & PASSWORDS</div><div>Locate and safely store account numbers & passwords. Ensure someone you trust knows how to access the following:</div><div><div><div>Bank & Mortgage:</div><ul style="list-style-type: none">CheckingSavingsMoney MarketMortgage Info<div>Credit Cards & Loans:</div><ul style="list-style-type: none">Credit CardsAuto LoansStudent LoansAdditional Loans</div><div><div>Investment & Benefits:</div><ul style="list-style-type: none">401(k)403(b)IRARoth IRAPension529/College SavingsStocks & BondsMutual FundsMilitary Benefits<div>Property Deeds & Titles:</div><ul style="list-style-type: none">Real Estate (Owned)Real Estate (Rented/Leased)Motor VehicleBoatsOther</div></div></div>	<div><div>ACCOUNT ACCESS</div><div>Ensure someone you trust knows how to access the following:</div><div><div>Personal Electronics/Digital Accounts:</div><ul style="list-style-type: none">Phone PasswordComputer PasswordTabwlestEmailWi-Fi</div></div> <div><div>Want more ways to organize your financial documents? Contact us today.</div></div>
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