

The background is a gradient from dark purple at the top to a lighter, warm orange at the bottom. It is decorated with various white line-art icons related to finance: stacks of money, coins, a piggy bank, a bar chart, a dollar sign, and a hand holding coins.

Getting your **Financial House** In order

Presented By: Kristina Hosch

Kristina Hosch

Kristina Hosch is an entrepreneur, marketplace, and ministry leader. Kristina has provided affordable housing for thousands of families for over three decades as real estate developer in New York City and Dutchess County.

Kristina founded the non-profit organization, The Revolving Door Inc., which provides mentorship and entrepreneurial opportunities for today's under privileged youth.

Kristina co-labor's with those called to equip, lead, protect, and establish the Kingdom of God here on earth.



Gather Personal Information

Create a Personal Life book/binder/planner

- **Copy of birth certificate**
- **Social Security card**
- **Passport**
- **Will & trusts**
- **All bank accounts & financial information**
- **Insurance policies, assets**
(eg: mortgages, car & house deeds/loans)
- **Legal documents, all password and any investment information**





Personal Wishes

In the event you can not speak for yourself, express your wishes for Life-Support & Pain Support medicine. This is where a medical proxy is important.

Here are some things to think about

- **Organ Donation**
- **Cremation**
- **Burial**
- **Green Burial**
- **Flowers**

- **Donation to charities**
- **Special requests (Casket, Repass & Attire)**
- **Formal/ traditional burial**
- **Memorial/ Celebration of Life Service**

Write Your Will

**List instructions on what to do with your Assets
(ie: Underaged children, pets, belongings)**

Assign an Executor

Someone responsible to carry out your wishes

Legalize

**Write it in your own words and submit it to an
attorney to formalize legally**

Secure

**Choose a secure location for your will and make sure
your attorney and your loved ones have a copy of it**





Power of Attorney

Appoint a Power of Attorney

***This can be an actual attorney or a loved one.
(Please discuss this with the person in advance)
There should be no surprises here; Family should be well informed***

Beneficiaries

Choose Beneficiaries in advance

A Beneficiary is someone who inherits your assets.

If this is a child, than a legal guardian over these assets must be appointed until the child is of legal age. List all insurance policies.

Living Trust

Consider starting a Living Trust

This is a legal document that allows you to transfer your assets to your beneficiaries without going through the probate process.

This is important because probate is time consuming, emotionally stressful, expensive and can be difficult. This is called estate planning and will require an attorney for legal reasons. It is worth sitting with an estate planner to discuss your options.





Life Insurance

Purchase Life Insurance

Life Insurance is a beautiful way to help loved ones with funeral expenses as well as foundationally sowing into their future and creating a legacy.

The younger you are the more affordable and wise this is to purchase. This could be the single most important thing you do to ensure peace for your family.

Digital Assets

- ***Create a check list of all digital media platforms***
- ***List all social media accounts, domain names, online banking, financial & investment information, email accounts, photos & files.***
- ***Other online personal or business accounts and passwords***
- ***All device passwords (laptops, iPhone, tablets & etc.,)***

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