

# Life & Legacy Planning Checklist

The most important plan of your client's life.

## Make Planning Easy.

Did you know that **50%** of American households say they **need more** life insurance? Or that **52%** of Americans between **55 and 64 don't have a will**? Having a comprehensive plan can be complex and involved. But it doesn't have to be.

## You can support your client's planning process.



**First, start the conversation.** When you follow a few simple discussion points, it's easy to get people talking, even about life & legacy planning:

- Is all of your paperwork pulled together?  
Is it in a box under your bed?
- Do you want people to know who gets the family heirlooms? Do you want them to know why?
- You know if your partner has a will or life insurance policy, but do you know all her usernames and passwords if she isn't there to share them?



**Second,** help your clients get organized with this checklist.

**An added benefit:** it will give you a reason to reach out to your clients all year long.

# Life & Legacy Planning Checklist

The most important plan of your life.

## Getting Started

Here is a checklist of some of the essential documents, accounts, and types of information you should organize and have at the ready before starting your planning.

### INSURANCE INFO

- Life Insurance
- Health Insurance
- Car Insurance
- Home Insurance
- Renters Insurance
- Long-Term Care Insurance
- Funeral Insurance
- Disability Insurance
- Disaster Insurance
- Other Insurance Policies (Example: Umbrella, Personal Articles)

### BANK ACCOUNTS / MORTGAGE / LOANS

Have a recent account statement for each, location of related items (example: checkbooks, passbooks), and account/login and password for online management.

- Checking
- Savings
- Money Market
- Certificate Of Deposit (CDs)
- Mortgage Info
- Loan Info
- Other (Example: Debit Card, Promissory Note):

### CREDIT CARDS

Have a recent account statement for each account and login/password for online management.

- American Express    Last 4 Digits: \_\_\_\_\_ Exp. Date: \_\_\_\_\_
- Discover    Last 4 Digits: \_\_\_\_\_ Exp. Date: \_\_\_\_\_
- Mastercard    Last 4 Digits: \_\_\_\_\_ Exp. Date: \_\_\_\_\_
- Visa    Last 4 Digits: \_\_\_\_\_ Exp. Date: \_\_\_\_\_
- Other:



## INVESTMENTS / PENSIONS / BENEFITS

Have a recent account statement for each account & current login and password for online management.

- |  |  |
|--|--|
| <input type="checkbox"/> Stocks  | <input type="checkbox"/> Bonds               |
| <input type="checkbox"/> Mutual Funds  | <input type="checkbox"/> Military Benefits   |
| <input type="checkbox"/> 401(k)  | <input type="checkbox"/> 403(b)              |
| <input type="checkbox"/> IRA   | <input type="checkbox"/> Roth IRA            |
| <input type="checkbox"/> Pension (SEP / SARSEP)                                  | <input type="checkbox"/> 529/College Savings |
| <input type="checkbox"/> Other (Example: Trust Fund, Specific Employee Benefits) |  |

## PROPERTY DEEDS / TITLES

- |  |  |
|--|--|
| <input type="checkbox"/> Real Estate (owned) | <input type="checkbox"/> Real Estate (rented/leased) |
| <input type="checkbox"/> Motor Vehicles      | <input type="checkbox"/> Boats                       |
| <input type="checkbox"/> Other               |  |

## UNLOCKING ELECTRONICS / SECURITY

This is to ensure someone you trust knows how to access the following. Have current login & password.

- |  |   |
|--|---|
| <input type="checkbox"/> Mobile Phone  | <input type="checkbox"/> Password Manager |
| <input type="checkbox"/> Home Security | <input type="checkbox"/> Tablet           |
| <input type="checkbox"/> Computer(s)   | <input type="checkbox"/> Wi-Fi            |
| <input type="checkbox"/> Other         |   |

## DIGITAL ACCOUNTS / SERVICES

Be prepared to identify all of the following digital accounts and services you use.

- |  |   |
|--|---|
| <input type="checkbox"/> Email   | <input type="checkbox"/> Entertainment (Video / Music / Gaming) |
| <input type="checkbox"/> Cloud Storage   | <input type="checkbox"/> Food / Delivery                        |
| <input type="checkbox"/> Health / Medical (medication)                               | <input type="checkbox"/> Messaging / Voice-over-IP              |
| <input type="checkbox"/> Money Management  | <input type="checkbox"/> Shopping                               |
| <input type="checkbox"/> Social Media  | <input type="checkbox"/> Software Licenses                      |
| <input type="checkbox"/> Travel / Ticketing  | <input type="checkbox"/> Web Hosting / Blogging                 |
| <input type="checkbox"/> Other (Example: Photography, Organization, Productivity...) |   |