



FINANCIAL FOCUS

REGAIN FOCUS, REGAIN CONTROL

Your Love File

We all face emergencies and trying times that will require us to have important documentation available to us. Whether a major storm, fire, medical illness, accident or even death - we need to get to important documentation quickly. Preparing, placing and securing this file is important to any family. What is needed?

FINANCIAL

Banks - Account numbers, bank locations and phone numbers, on-line access info and passwords(store separately)

Investments - Account numbers, locations, phone numbers, names, on-line access info and passwords (store separately)

Safe Deposit Box - Where, key locations, list of what is kept there

INSURANCE

Home - Policy Numbers, phone numbers, location of printed policy

Auto - Policy Numbers, phone numbers, location of printed policy

Life/Disability - Policy Numbers, phone numbers, location of printed policy, amounts and list of beneficiaries

Umbrella - Policy Numbers, phone numbers, location of printed policy

Business - Policy Numbers, phone numbers, location of printed policy

REAL ESTATE

Deeds - Names of owners, location of paperwork for all properties owned - including tax info and appraisals

Mortgage/Second Mortgage Docs - Location of paperwork

FAMILY

Contact information - List of who and how to contact in an emergency

Genealogy Docs (if relevant)

Pictures - Location of most valued pictures

BUSINESS

Partnership Agreements - Location of important paperwork

Business Insurance Documents - Policy numbers, contact info and location of printed policies

Important Phone Numbers - List of who and numbers

ESTATE PLAN

Wills/Trusts Copies - Place all copies in a safe place - where are those? Where are originals. Contact name and number for attorney.

Power of Attorney(s) - Who has POA, location of documents.

Recent Tax Documents - The last couple of years returns may want to be placed here, but definitely the location of the copies. Name and contact info for CPA or tax preparer.

Funeral Plans - List of requested arrangements, funeral homes - including pre-planning setup, service info, etc. Make your family's tasks easier with your known wishes.