

INFORMATION CHECKLIST

In these troubled times, it is important for each of us to prepare a checklist of critical financial information about ourselves, so that our family and loved ones will not be burdened at a time of a crisis, when such information is needed. This information should be kept somewhere safe yet accessible. Do not keep the information in a safety deposit box but do keep it somewhere secure (for example, with your children or your attorney or your accountant) so that no unauthorized person could gain access to it. Here is a partial list of the information that you should have on the checklist:

- **Bank Accounts and Safe-Deposit Boxes** – all bank names, account numbers, personal contact (if available), location of safe-deposit box, contents of box, and location of box key
- **Credit Cards** – issuers, account numbers, expiration dates, special information (airline mileage points, balances owed and passwords/PIN numbers);
- **Insurance** (home, care, life, health and long-term care) – issuers, account numbers, agents, premium due dates;
- **Health Care** – contact information for physician, current medications and dosages, Medicare number, Medigap policy number;
- **Taxes** – account amount information, location of copies of past filings;
- **Investment and Retirement Accounts** – names of brokerage or plan administrators, account numbers, PIN numbers, names of bankers or brokers;
- **Legal Documents** – will, trusts, power of attorney, contact information for fiduciaries and attorney;
- **House** – information on your mortgage or rent, due date, location of deeds and property titles, contact information for service people;
- **Last Wishes** – arrangements for funeral and burial, organ donation wishes;
- **Miscellaneous** – driver's license number and expiration date, vehicle title and registration information, any items in storage, storage company phone number, contact information for neighbors and friends, email accounts and passwords, combinations to any safes, lists of automatic payments from and deposits to bank accounts.