



The Law Offices of

CATHERINE R. MACK

Article of Interest

Financial Information Checklist

In these troubled times, it's important to prepare a checklist of critical financial information about yourself, so your family and loved ones won't be burdened at a time of crisis.

This information should be kept somewhere safe, yet accessible. Don't keep it in a safety deposit box, but do keep it somewhere secure (for example, with your attorney or your accountant) so no unauthorized person could gain access to it. Here is a partial list of the information that you should have:

BANK ACCOUNTS AND SAFE DEPOSIT BOXES - all bank names - account numbers - personal contact, if available - location of safe-deposit box - contents of box - location of box key

CREDIT CARDS - issuers - account numbers - expiration dates - special information (airline mileage points, balances owed)

INSURANCE (Home, car, life, health, long-term care) - issuers - account numbers - agents - premium due dates

HEALTH CARE - contact information for physicians - current medications and dosages - Medicare claim number - Medigap policy number

TAXES - accountant information - location of past filings

INVESTMENT AND RETIREMENT ACCOUNTS - names of brokerage or plan administrators - account numbers - PIN numbers - Names of bankers or brokers

LEGAL DOCUMENTS - wills - trusts - power of attorney - trustees of all the documents - contact information for lawyers

HOUSE - amount of mortgage payment 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 registration information - any items in storage - storage company phone number - contact information for neighbors and friends - e-mail accounts and passwords - combination to any safes - list of automatic payments from and deposits to bank accounts.