

CREATE A PERSONAL FINANCES NOTEBOOK

In order to make the administration of your estate easier for your loved ones, you should create a notebook of your family finances. If something happens to you, your family can continue to conduct business or administer your estate with a minimum of difficulty. Here are some of the things you should include:

Banks and Brokerage Accounts (with account numbers, location and contact info like telephone numbers and names of account representatives)

- Copies of Insurance Policies
- Location of Wills, Deeds, Car Titles
- Location of Safe Deposit Boxes
- Name address, telephone and e-mail of attorney, accountant, financial planner, insurance agent
- Information about any closely owned or family businesses, including location of shares of stock, shareholder agreements, buy-sell agreements and insurance owned in connection with same
- Information about pre-paid funeral or other instructions expressing your wishes at death

Update your notebook when you are preparing your taxes each year.

Most important: Make sure your family knows where to find the notebook!