



Getting Your Ducks in a Row: Documents Adults Need

While we firmly believe life is meant to be lived, we also know that it's important to have peace of mind in the event of an emergency. We've put together a detailed checklist to help you organize your life.

TOP 4 IMPORTANT DOCUMENTS ADULTS NEED BUT DON'T HAVE:

A WILL

aka

LAST WILL & TESTAMENT

A will essentially states: when I die, here's what I want to happen.

A LIVING WILL

aka

AN ADVANCE DIRECTIVE

In this document, you'll declare your wishes for end-of-life care.

DURABLE HEALTH CARE POWER OF ATTORNEY

aka

A HEALTH CARE PROXY

In the event that you can't make your own health care decisions, you need to have someone you trust like a family member or friend.

DURABLE FINANCIAL POWER OF ATTORNEY

aka

AN ATTORNEY-IN-FACT OR AGENT

This document outlines who you want to make financial decisions if you can't make them for yourself.

CRITICAL DOCUMENTS

Locate and safely store the following items:

OFFICIAL DOCUMENTS:

- Will
- Living Will
- Health Care Power of Attorney
- Financial Power of Attorney
- Trusts

IDENTIFICATION:

- Birth Certificate
- Driver's License
- Social Security Card
- Passport
- Armed Forces ID/ Discharge Papers
- Citizenship Documentation
- Marriage Certificate
- Divorce Decree/Settlement Info

INSURANCE INFO:

- Life Insurance
- Health Insurance
- Car Insurance
- Home/Renters Insurance
- Funeral Insurance
- Disability Insurance

ACCOUNT ACCESS

Ensure someone you trust knows how to access the following:

PERSONAL ELECTRONICS/ DIGITAL ACCOUNTS

- Phone Password
- Computer Password
- Tablets
- Email
- Wi-Fi

**Want more ways to organize
your financial documents?**
Contact us today.



401K EXTRA | RETIRE YOUR WAY

Fran Gillis AIF, QPFC, PPC, CFPW

Lucas Gillis CPFA, CFPW

connect@401kextra.com

970-225-2001

www.401kextra.com

ACCOUNT INFO & PASSWORDS

Locate and safely store account numbers & passwords. Ensure someone you trust knows how to access the following:

BANK & MORTGAGE:

- Checking
- Savings
- Money Market
- Mortgage Info

CREDIT CARDS & LOANS:

- Credit Cards
- Auto Loans
- Student Loans
- Additional Loans

INVESTMENTS & BENEFITS

- 401(k)
- 403(b)
- IRA
- Roth IRA
- Pension
- 529/College Savings
- Stocks & Bonds
- Mutual Funds
- Military benefits

PROPERTY DEEDS & TITLES:

- Real Estate (owned)
- Real Estate (rented/leased)
- Motor Vehicles
- Boats
- Other

Fran Gillis and Lucas Gillis are Investment Advisor Representatives of Dynamic Wealth Advisors dba 401k Extra LLC. All advisory services offered through Dynamic Wealth Advisors.

This information has been developed as a general guide to educate plan sponsors and is not intended as authoritative guidance or tax/legal advice. Each plan has unique requirements and you should consult your attorney or tax advisor for guidance regarding your specific situation.

© 401(k) Marketing, LLC. All rights reserved. Proprietary and confidential. Do not copy or distribute outside original intent.