

First Quarter Planning for 2023

Make a resolution to review your estate plan and confirm important information is available to a family member or trusted friend in the event of an emergency or death.

While not all inclusive, the following information should be reviewed then communicated to your designated contact. **Where access to an account is online, provide usernames, passwords and security question answers with account information.**

For example, typical information includes:

- Location of original will, power of attorney, advance medical directive and trusts
- Bank account numbers and the location of statements together with the location of your safe deposit box, box number and key
- Brokerage account numbers and contact information for the account manager
- Information on any individually held stock, including the location of the original certificate(s)
- Retirement account numbers and the location of the statements
- Life insurance information including the name of the company and policy number(s)
- Vehicle information including the location of the original title, insurance policy number and contact information, and any applicable loan information

- Information regarding real estate ownership including the mortgage company name, account number and contact information, together with homeowner's insurance company name and account number

- Information on any funeral arrangements or other burial information (funeral wishes, cemetery information, plot ownership, etc.)

- The location of tax returns for the prior three years with accountant's contact information

- List of tangible personal property to go to specific people, if applicable

- Credit card information with name of the company and account number

- Information regarding electronic documents stored on a computer, tablet or phone, together with device and document usernames, security codes and passwords

- Private key information and instructions for any cryptocurrency account

- Medical information including physician contact and prescription list

- The location of household keys and cash in hidden places (books, freezer, under the mattress, etc.)

A friend recently referred to January resolutions as a "to do" list. With that in mind, using each New Year as an annual reminder to collect, verify and communicate personal information to a designated contact will help ease the stress and anxiety caused by life's difficult situations.

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