

LifeFolio checklist

LET'S TURN YOUR PILES INTO FILES



INVESTMENTS

Whether changing jobs, buying a home, or preparing for retirement, major life events can send you scurrying to find documents.

If hard-pressed, most of us will have difficulty locating critical papers. Think of the LifeFolio checklist as a direct link to your VIPs—Very Important Papers. The LifeFolio checklist helps you organize the paperwork associated with key aspects of your life. And, the LifeFolio checklist makes it easy to share the information with those closest to you, as well as with those responsible for the more financial and legal parts of your life—such as your financial professional, attorney, accountant, and executor.

Key Contacts	Address	Phone Number
Financial professional		
CPA/Accountant		
Insurance representative		
Attorney		
Executor		
Emergency Papers or Information	Location	
General items—documents that should always be readily available.		
Social Security card		
Birth certificate		
Passport/Citizenship (naturalization) papers		
Driver's license number and expiration date		
Adoption papers		
Marriage certificate		
Prenuptial agreement		
Divorce or separation papers		
Safe and combination		
Safe deposit box(es) and keys		
Investment documents—documents needed for transfer of ownership per Last Will and Testament and credit applications.		
Brokerage account statements		
Mutual fund account statements		
Individual retirement plan statements		
Company retirement plan statements from all employers		
Other company benefits		
Stock certificates not held in an account		
Bearer bonds not held in an account		
Alternative investment documents (including K-1s)		
Investment club documents/records		
529 college savings plan statements		
Online securities transaction information		
Beneficiary forms for IRAs, 401(k)s, or other benefit plans		
Documents showing cost basis of securities owned or sold		

Emergency Papers or Information	Location
Insurance and Annuity documents—needed to settle claims.	
Life insurance policy documents	
Group life insurance policy documents	
Health and accident insurance ID cards and claim records	
Variable or Fixed annuity statements/documents	
Mortgage insurance policy documents	
Travel insurance policy documents	
Property and Casualty insurance policy documents	
Veterans administration insurance papers	
Beneficiary forms for insurance or annuity policies	
Long-Term Care insurance policy documents	
Personal financial documents—documents needed to settle debts and transfer ownership per Last Will and Testament.	
Appraisal or inventory of valuable items	
Buy/sell or partnership agreement documents	
Deferred compensation agreement documents	
Federal/State/Gift tax returns	
Prior years' tax returns	
Motor vehicle title papers	
Lawsuit or documents on pending legal actions	
Promissory notes (debts owed)	
Loans outstanding (money owed)	
Mortgage documents	
Medical bills, prescription plan card/records	
Property and school tax records	
Real estate deeds, other titles of ownership	
Rental and/or lease agreements	
Trust documents/agreements	
Bank/Credit documents—documents needed to settle outstanding credit accounts and free up necessary cash to settle the affairs of an estate.	
Checking or money market account statements	
Checks (checking or money market)	
Savings account statements	
Credit cards and account statements	
Credit union account books or statements	
The items below may be needed when someone becomes seriously ill.	
Living Will/Health care proxy	
Durable Power of Attorney	
The right of survivorship—assets held in this manner are not subject to probate (unless both parties are deceased); instead, the survivor simply provides evidence of death to the appropriate financial institutions, so that the title can be changed.	

Emergency Papers or Information	Location
The items below may be needed soon after someone dies.	
Last Will and Testament Wills should never be stored in a safe deposit box. Instead, wills should be kept in either a lawyer's will safe or a fireproof safe at home.	
Military discharge papers Veterans receive a small stipend toward burial expenses.	
Burial instructions	
Cemetery plot deed	
Pre-paid cremation documents	
Funeral home preference and information	
Charitable donation preference(s)	
Letter of instruction (if available) from the deceased to his/her executor	
Death certificate Order one copy for each account or title of ownership of the deceased.	
Phone number/Address of County Surrogate Court The county court or clerk's office where the deceased resided handles the estate matters and will probate the Last Will and Testament. The executor should obtain a sufficient number of death certificates for transferring ownership of accounts, titles, etc.	
Information for obituary (e.g., resume)	

The information contained herein is general in nature and is provided solely for educational and informational purposes. New York Life Investments does not provide legal, accounting or tax advice. You should obtain advice specific to your circumstances from your own legal, accounting and tax advisors.

For more information

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