

### The Get Your Affairs in Order Checklist

Use this checklist to put your loved ones at ease

- Determine what assets you have and how you would want them to be distributed
- Develop a Living Trust and / or Will depending on the amount of assets you have
- Create a list of key usernames and passwords e.g. bank accounts, 401K, investment accounts etc.
- Identify a Power of Attorney and complete the form
- Complete a Health Care Proxy form
- Identify beneficiaries for all assets e.g. 401K, Roth 401K, IRA, 403b, investment accounts, life insurance etc.
- Write down your final arrangements wishes
- Have the get your affairs in order conversation with your parents
- Communicate your affairs to a trusted person and provide them copies and access to this information