FAMILY FINANCIAL ORGANIZATION CHECKLIST

CSENGE ADVISORY GROUP

PREPARE THE PEOPLE YOU TRUST TO HELP IF NEEDED.

REVIEW YOUR PLANS & ORGANIZE KEY RECORDS

Conversations & Future Preferences

- ☐ Identify which adult children or other trusted people you want involved.
- ☐ Discuss your wishes for future living arrangements and care, if your needs change.
- ☐ Clarify the support you would welcome and the responsibilities you prefer to delegate.
- ☐ Consider how potential long-term care expenses would be addressed.

Financial Professionals & Contacts

- ☐ Identify your financial advisor, tax professional, estate planning attorney, and insurance contacts.
- ☐ Make their contact information available to the appropriate people.

Financial Accounts, Income & Obligations

- ☐ List the institutions holding your bank, investment, and retirement accounts.
- ☐ Identify income sources, recurring bills, debts, and automatic payments.
- ☐ Locate account statements, recent tax returns, and related records.

Insurance, Property & Other Assets

- ☐ Locate life, health, long-term care, property, and other relevant insurance policies.
- ☐ Identify where deeds, titles, and records of other significant assets are kept.

Estate Plans & Decision-Making Authority

- ☐ Locate wills, trusts, and financial powers of attorney, if applicable.
- ☐ Review beneficiary designations and designated decision-makers with your professionals.
- ☐ Confirm whether separate healthcare directives or authorizations are in place.

Secure Storage, Access & Ongoing Updates

- ☐ Choose a secure location for physical or digital copies of important records.
- ☐ Decide who should know where information is stored and who is legally authorized to act.
- ☐ Communicate relevant changes to the people you have chosen to involve.