

Documents to Gather Before You Start Your Everplan

Take your planning to the next level.

Help your clients get organized in every area.

According to the American Bar Association, **55%** of Americans die **without a will or an estate plan**. Which means lots of families are being left with a stressful mess—a mess that can be avoided!

Everplans Professional gives your clients the tools to let you know when it's time for a check-in or an estate plan update. By keeping the important people and documents in a single secure place, you can have a real-time overview of each of your client's plans, as well as any information they may have updated—or need to update.

You can support your client's planning process.



First, start the conversation. When you follow a few simple discussion points, it's easy to get people talking, even about large-scale planning. Ask:

- Does anyone know where your most important legal documents are stored? If something were to happen to you, would they be lost?
- Does anyone have a complete list of the online services you use? Could someone cancel those accounts if need be?
- Does your family know about every insurance policy you have, and where the paperwork for those policies are? Could they easily file a claim?



Second, help your clients get organized with this "Important Documents" checklist.

An added benefit: Have your clients create an Everplan and it'll give you a reason to reach out to them all year long.

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Documents to Gather Before You Start Your Everplan

Take your planning to the next level.

Getting Started

Here are some of the essential documents, accounts, and types of information you should organize and have at the ready before setting up an Everplan. By gathering all this essential information, you'll be ready to take your planning to the next level, and be prepared for anything.

This checklist includes the following:

- Important Contacts
- Important & Official Documents
- Financial Accounts & Assets
- Home & Vehicle Information
- Personal Identification
- Digital Estate & Asset Information

Remember

[Create an Everplan](#) to easily and securely update and share this vital info with the people you love and trust.

IMPORTANT CONTACTS

- Emergency Name/Info: _____
- Work Name/Info: _____
- Doctor Name/Info: _____
- Financial/Accountant Name/Info: _____
- Insurance Agent Name/Info: _____
- Lawyer Name/Info: _____
- Other Name/Info: _____
- Other Name/Info: _____

OFFICIAL DOCUMENTS

- Advance Health Care Directive
- Trusts
- Insurance Policy
- Power Of Attorney
- Will
- Other:

IDENTIFICATION / VITAL DOCUMENTS

- Birth Certificate
- Social Security Card
- Passport
- Marriage Certificate
- Other (Example: Club Memberships, State ID card, etc.):
- Driver's License
- Armed Forces ID / Discharge
- Papers Citizenship Documentation
- Divorce Decree / Settlement Info



INSURANCE INFO

- | | | |
|--------------------------------------------|-----------------------------------------------|---------------------------------------------------|
| <input type="checkbox"/> Life Insurance | <input type="checkbox"/> Health Insurance | <input type="checkbox"/> Car Insurance |
| <input type="checkbox"/> Home Insurance | <input type="checkbox"/> Renter's Insurance | <input type="checkbox"/> Long-Term Care Insurance |
| <input type="checkbox"/> Funeral Insurance | <input type="checkbox"/> Disability Insurance | <input type="checkbox"/> Disaster Insurance |
- Other Insurance Policies (Example: Umbrella, Personal Articles, etc.):
-
-
-

BANK ACCOUNTS / MORTGAGE / LOANS

Have a recent account statement for each, location of related items (example: checkbooks, passbooks), and account/login and password for online management.

- | | |
|----------------------------------------|-------------------------------------------------------|
| <input type="checkbox"/> Checking | <input type="checkbox"/> Savings |
| <input type="checkbox"/> Money Market | <input type="checkbox"/> Certificate Of Deposit (CDs) |
| <input type="checkbox"/> Mortgage Info | <input type="checkbox"/> Loan Info |
- Other (Example: Debit Card, Promissory Note, etc.):
-
-
-

CREDIT CARDS

Have a recent account statement for each account and login/password for online management.

- | | | |
|-------------------------------------------|----------------------|------------------|
| <input type="checkbox"/> American Express | Last 4 Digits: _____ | Exp. Date: _____ |
| <input type="checkbox"/> Discover | Last 4 Digits: _____ | Exp. Date: _____ |
| <input type="checkbox"/> Mastercard | Last 4 Digits: _____ | Exp. Date: _____ |
| <input type="checkbox"/> Visa | Last 4 Digits: _____ | Exp. Date: _____ |
- Other:
-
-
-



INVESTMENTS / PENSIONS / BENEFITS

Have a recent statement for each account, as well as login info and password for online management.

- | | |
|-----------------------------------------------------------------------------------------|----------------------------------------------|
| <input type="checkbox"/> Stocks | <input type="checkbox"/> Bonds |
| <input type="checkbox"/> Mutual Funds | <input type="checkbox"/> Military Benefits |
| <input type="checkbox"/> 401(k) | <input type="checkbox"/> 403(b) |
| <input type="checkbox"/> IRA | <input type="checkbox"/> Roth IRA |
| <input type="checkbox"/> Pension (SEP / SARSEP) | <input type="checkbox"/> 529/College Savings |
| <input type="checkbox"/> Other (Example: Trust Fund, Specific Employee Benefits, etc.): | |
-
-

PROPERTY DEEDS / TITLES

- | | |
|----------------------------------------------|------------------------------------------------------|
| <input type="checkbox"/> Real Estate (owned) | <input type="checkbox"/> Real Estate (rented/leased) |
| <input type="checkbox"/> Motor Vehicles | <input type="checkbox"/> Boats |
| <input type="checkbox"/> Other: | |
-

HOUSEHOLD UTILITIES

Have a recent account statement for each utility, as well as contact info if applicable.

- | | |
|-------------------------------------------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Electricity | <input type="checkbox"/> Gas |
| <input type="checkbox"/> Water | <input type="checkbox"/> Heating Oil |
| <input type="checkbox"/> Phone | <input type="checkbox"/> HVAC |
| <input type="checkbox"/> Cable | <input type="checkbox"/> Septic |
| <input type="checkbox"/> Internet | <input type="checkbox"/> Garbage |
| <input type="checkbox"/> Landscaping | <input type="checkbox"/> Cleaning Service |
| <input type="checkbox"/> Plumber | <input type="checkbox"/> Exterminator |
| <input type="checkbox"/> Electrician | <input type="checkbox"/> Home Automation |
| <input type="checkbox"/> Other (Example: Decorator, Pool Cleaner, etc.) | |
-
-

UNLOCKING ELECTRONICS / SECURITY

Ensure someone you trust knows how to access the following.

- | | | |
|----------------------------------------|-------------------------------------------|---------------------------------|
| <input type="checkbox"/> Mobile Phone | <input type="checkbox"/> Computer(s) | <input type="checkbox"/> Tablet |
| <input type="checkbox"/> Home Security | <input type="checkbox"/> Password Manager | <input type="checkbox"/> Wi-Fi |
| <input type="checkbox"/> Other: | | |

DIGITAL ACCOUNTS / SERVICES

Be prepared to identify all of the following digital accounts and services you use.

- | | |
|------------------------------------------------------------------------------------------|-----------------------------------------------------------------|
| <input type="checkbox"/> Email | <input type="checkbox"/> Entertainment (Video / Music / Gaming) |
| <input type="checkbox"/> Cloud Storage | <input type="checkbox"/> Food / Delivery |
| <input type="checkbox"/> Health / Medical (medication) | <input type="checkbox"/> Messaging / Voice-over-IP |
| <input type="checkbox"/> Money Management | <input type="checkbox"/> Shopping |
| <input type="checkbox"/> Social Media | <input type="checkbox"/> Software Licenses |
| <input type="checkbox"/> Travel / Ticketing | <input type="checkbox"/> Web Hosting / Blogging |
| <input type="checkbox"/> Other (Example: Photography, Organization, Productivity, etc.): | |

MISCELLANEOUS IMPORTANT INFO

- | | |
|----------------------------------------------------------------|--------------------------------------------------------------------|
| <input type="checkbox"/> Dependents (Children, Special Needs) | <input type="checkbox"/> Magazine/Newspaper Subscriptions |
| <input type="checkbox"/> Pets (Vet, Diet, Guardian, Insurance) | <input type="checkbox"/> Collectibles (coins, stamps, memorabilia) |
| <input type="checkbox"/> Other: | |



LEGACY / AFTER I'M GONE

Things you should think about even if you haven't done any planning yet.

- Decide among: Burial / Cremation / Donation
- Funeral / Memorial Preferences
- Contracts / Prepaid Arrangements (Example: cemetery plot information)
- Obituary Preferences and info, which typically includes:
 - o Date/place of birth: _____
 - o Date/place of marriage: _____
 - o Parents' names: _____
 - o Education (schools/degrees): _____
 - o Military/Public service (honors, awards, achievements):

 - o Employment (titles, awards, achievements):

 - o Organization affiliations (religious, cultural, civic):

 - o Special accomplishments: _____
 - o Hobbies and Interests: _____
- Letters For Family/Friends (list names of people you want to write a personal letter)



NOTES & PERSONAL THOUGHTS

Use this section for any important information, personal thoughts, or anything we may have missed. Remember, you can do this all online. Create an Everplan so that this information, along with much more, is neatly organized, securely stored, and easy to share with the people you care about most.

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Create, store, and share all of the digital and online account information in this document (and so much more) in a personalized Everplan so it's accessible to those who will need it.

