

15 IMPORTANT ITEMS

(WHAT YOU'LL NEED WHEN TRAGEDY HAPPENS)

While we all like to think that our parents and loved ones will live forever, unfortunately that just isn't the case. When tragedy inevitably strikes, however, the last thing you'll want to do is search for documentation to help you ensure that your loved ones' wishes are carried out and that their finances are in order.

In an effort to help you prepare, we've compiled a list of 15 items that could be useful in the case of an emergency, unanticipated illness, incapacitation or passing. We encourage everyone to collect these items, not only for themselves, but also their aging parents.

1. Social Security number
2. Safe deposit box number / location / location of the key
3. Location of tax records
4. Location of homeownership papers, mortgage and title
5. Most recent will and estate-planning paperwork
6. Insurance and policy numbers, as well as their issuer
7. Name and location of accountant, attorney, and financial advisor
8. Bank account numbers and location
9. Financial investments, such as mutual funds, certificates of deposit, or bonds
10. Contact name and account numbers for pensions and 401(k)s
11. Location of auto and other vehicle titles
12. Details of outstanding debts
13. Funeral and burial wishes
14. Account information for utilities and/or any bills on automatic payment plans
15. [Financial Document Organizer](#)

**DO YOU OR A LOVED ONE NEED ASSISTANCE
PREPARING & PLANNING FOR THE FUTURE?**

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