

Financial Resolutions Checklist

Can you ever be too prepared in life? Why not start planning so that if anything happens to you, your family and loved ones will be looked after.

Date: _____

Your will

Do you have a current one in place? ☐ Y ☐ N

Have you named a guardian for any minor children? ☐ Y ☐ N

Is it in a safe location? ☐ Y ☐ N

Do your spouse, adult children, and/or executor know where to find it? ☐ Y ☐ N

Your funeral

Have you shared your wishes with your family? ☐ Y ☐ N

Have you thought of costs required or funeral expenses? ☐ Y ☐ N

Have you put aside money for your funeral so it's available for your family? ☐ Y ☐ N

Your basic estate planning

(Power of Attorney, Living Wills, Health Care Directives)

Have you discussed these with your family? ☐ Y ☐ N

Do you have the appropriate documents in place? ☐ Y ☐ N

Your assets

Do you have a list of bank accounts, retirement funds, investments, and any relevant passwords? ☐ Y ☐ N

Do you have a record of all significant assets and property? ☐ Y ☐ N

Do you have a contact list of bankers, lawyers and financial advisors? ☐ Y ☐ N

Your debts

Do you have a list of all debts, due dates, and contact information? ☐ Y ☐ N

Do you have life insurance to pay off your debts in the event of your death? ☐ Y ☐ N

Your insurance certificates and policies

Do you have a record of all the insurance you own? ☐ Y ☐ N

Do you have a contact list of your insurance advisors? ☐ Y ☐ N

Have you talked to your life insurance advisor about the different types of certificates and policies available to help your loved ones when you pass away? ☐ Y ☐ N

Your employment and government benefits

Do you have list of employer contacts to find out if there are any amounts owing in salary or vacation? ☐ Y ☐ N

Are there any company death benefits your family should be aware of? ☐ Y ☐ N

Does your family know they can apply for survivor pension benefits, such as social security survivor benefits? ☐ Y ☐ N

Your important information

Do you have all the important information for your loved ones, financial documents and your final requests in one place? ☐ Y ☐ N