

The topic of beneficiaries and where your assets reside is often met with a mentality of we have time, let's talk about it later. You sharing this information is a reminder that one day that person might actually need to take action on your behalf – and that's not a comfortable topic. Being proactive will serve you and your loved ones well in the future – trust us.

This checklist is meant to capture information and remind you that your beneficiaries are not always aware of their role in your estate. A simple conversation can help you rest easy that your wealth will be taken care of in the manner in which you hoped it would be.

Let's get started!

First off, do you have a will?

- If so, where is it stored?
- Does the person named as executor know their role?

Next, let's document some key information about your primary contacts, assets and financial accounts. We recommend that you review and update this information annually - especially the beneficiaries. Did you know that a beneficiary named on an account often takes priority over what a will or estate document specifies? That's why it's extremely important to keep the information up to date.

List of Assets

(Examples include retirement plans, Life Insurance, annuities, investment accounts, bank accounts, credit cards, stock options, deferred compensation plans, etc.)

Account Type	Company	Account number	Primary beneficiary	Secondary beneficiary	Last Updated

Outstanding loan information

(Examples include home, vehicle, personal, etc.)

Loan	Company	Account number	Amount	Last Updated

Power of Attorney

(Examples include medical, financial, legal, business, real estate, etc.)

Type	Ordinary or Durable	Primary Contact	Secondary Contact	Last Updated	Paperwork Location

Important Contacts

	Company	Contact Name	Phone Number	Website
Financial Advisor	Crosby Advisory Group	Nate Crosby	419-496-0770	www.crosbyadvisory.com
Insurance Advisor	Crosby Advisory Group	Julie Maglott	419-496-0770	www.crosbyadvisory.com
Lawyer				
Accountant				
Other				

Other Helpful Information

- Are you a Veteran? If so, what is your VA number
- Are you on Medicare? If so, what is your Medicare number

Inform someone you trust of the following:

- Where do you store your primary paperwork – birth certificate, social security card, etc.? (Example: safety deposit box, safe, with a lawyer, etc.)
 - How does someone access it?
- Do you own any large assets?
 - If so, where do you keep the title(s)?
- How can someone get into your house?
- Do you have a home security system?
 - If so, what is the code?
- Share a list of your computer & phone passwords
- List of your current utility bills & account information
- Any other recurring payments & account information
- Document your email & social media account information

We recommend that you review and update this information annually - especially the beneficiaries - **today's date is** _____

Remember, this checklist is meant to gather information and help facilitate a conversation with your beneficiaries. It should not replace any other guidance you may receive from your legal, financial and/or other trusted sources.

Please note that listing beneficiaries on this form does not add, delete or change the beneficiary on your account(s). You will need to use the appropriate form(s) and/or contact your financial professional to legally add or amend beneficiary information.

Contact our office with any questions at all!