

# **What If? Are You Prepared?**

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GETTING YOUR AFFAIRS IN ORDER

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# Let's Begin...

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- What if some unforeseen occurrence would incapacitate your spouse or partner?
- Would you be able to access important documents quickly and easily?
- And if you are the person in charge, would your spouse or partner know how to carry on?
- Do you both know what documents are important? More on this later.
- Are your files kept electronically or on paper?
- Do you both know the logins and passwords for electronic files?

# Steps for Getting Your Affairs in Order

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- Put important papers and legal documents in one place
  - ✓ Bank Safe Deposit Box – Keep copies and an inventory at home
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  - ✓ “In the Cloud” – [Carbonite.com](https://www.carbonite.com)
- Tell a trusted family member or friend the location in case of an emergency

# Legal Documents

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- Many different types that may have different names depending on your state. State laws vary. Know your state's requirements and their forms.
  - ✓ Wills and Trusts
  - ✓ Advance Directives -
    - Living Will
    - Durable Power of Attorney for Healthcare
  - ✓ Durable Power of Attorney
  - ✓ General Power of Attorney

# Important Papers

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- Personal Records – Pages 2 and 3
- Financial Records – Page 3

# Bottom Line

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- Have an attorney
  - ✓ Referral from someone you trust
  - ✓ Lawyer referral services
  - ✓ Lawyer who specializes in elder care
- In your domicile state – jurisdiction over documents is determined by WHERE you sign the documents
- Residency vs. Domicile – Know the difference relative to your state.

# Important Information Spreadsheet

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- Sources of Income and Assets
- Investment Income
- Various Accounts
- Healthcare Insurance Information
- Loan Information
- Credit Card Accounts
- Other Recurring Obligations
- Legal Documents
- Vehicle Insurance and Title Information

# Medical Data

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Name

Date of Birth

Medications

Dosage

Frequency

Condition

Supplements

Dosage

Frequency

Hospitalizations/Procedures

Date

Procedure

Hospital

Chronic Conditions

What?

Since When?

# Discussion

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