

IF I AM INCAPACITATED OR DIE

This Binder should provide you with information about my documents, dealings, and assets that should help you to accomplish what all should be done. It contains my wishes, contacts, possessions and location of information about them. This Binder contains Quick Reference Tables, and names, contents, and locations of various folders in which documents are stored.

Include brief written instructions on the following items:

List of people, other than the obvious, who should be notified (including overseas) with phone numbers or email addresses.

Information about your attorney and financial advisor, if any.

Your wishes and pre-arrangements on Funeral Arrangements, Memorial service etc. (prepaid, if any).

Wills and Trust Information.

Life, Healthcare, and Long Term Care insurance policies.

Disposition of “stuff” not covered in will or trust (what to do with valuables, household items, house, cars etc.).

Sources of income (pensions, annuities etc.).