

# Critical financial checklist

A guide to ensure completion of your family's important financial steps

	COMPLETION DATE	NOTES
<b>Estate planning documents</b>		
<input type="checkbox"/> Wills/Trusts		
<input type="checkbox"/> Guardianships		
<input type="checkbox"/> Durable power of attorney		
<input type="checkbox"/> Medical power of attorney		
<input type="checkbox"/> Appropriate asset titling		
<input type="checkbox"/> Executor appointed		
<input type="checkbox"/> Successors appointed		
<b>Insurance/Umbrella policies</b>		
<input type="checkbox"/> Life		
<input type="checkbox"/> Disability		
<input type="checkbox"/> Home		
<input type="checkbox"/> Long-term care		
<b>Financial management</b>		
<input type="checkbox"/> Emergency cash reserves		
<input type="checkbox"/> Income/Expense budget review		
<b>Retirement savings</b>		
<input type="checkbox"/> Projected income/expenses analysis		
<input type="checkbox"/> Registered with Social Security		
<b>Education planning</b>		
<input type="checkbox"/> Projected potential cost analysis		
<input type="checkbox"/> Review of various funding alternatives		
<input type="checkbox"/> Funding sources in place		
<b>Financial information safety and access</b>		
<input type="checkbox"/> File location shared with partner(s)		
<input type="checkbox"/> Online account login information		
<input type="checkbox"/> List of asset location(s)		
<input type="checkbox"/> Contact information for financial providers		
<b>Aging plan</b>		
<input type="checkbox"/> Review of long-term care wishes		
<input type="checkbox"/> Final arrangements upon passing		