



Tuesday – January 24th 1:30p.m. Library Conference Room

Creating a Paper Trail for your Heirs

Please join us as we review a check list of items to include in the recommended Master List Notebook. The notebook will guide your heirs if you are no longer able to manage and helps assure no asset is overlooked and your wishes are known.

Table of Contents...

1. First Things First
2. Important Contact Information
3. Passwords
4. Location Directory
5. Items of Value (non-financial)
6. Net Worth Statement
7. Bill Anticipation Schedule
8. Safety Deposit Box Contents
9. Obituary Information
10. Circle of Friends/Contacts
11. Last Wishes

A sequential list of the notebook's organization structure which is arranged in time-sequence of "to-do" importance, addressing the essential elements of your financial situation.

