

# "ORGANIZING YOUR STUFF" CHECKLIST

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**Reminder:** Don't forget to tell the people you trust where your important documents are stored. Let them know ahead of time that they exist, where they are, and exactly how to use them.

- Funeral home/burial pre -arrangements
- Draft of obituary
- Memorial service desires
- Original signed will(s) [or a note that indicates where it is located]
- Memorandum describing specific desires for where certain items of important personal property will go
- Powers of attorney documents
- Living will/advanced medical directives
- List of key contacts and contact information
- Description of what you have/net worth statement
- List of financial accounts, copies of recent statement for each
- Recent tax return
- List of all user names and passwords for all:
  - Financial account(s)
  - Credit account(s)
  - Social media accounts
  - Memberships and subscriptions
- List of all life insurance policies and copies of the actual policies
- Copies of deeds of all real estate
- Letters to loved ones

**Want to organize the rest of your finances? We'll help!**

**Contact a Stonecrop Advisor today!**