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South Shore Conference for Women October 22, 2020 Embracing Change: Keys to Thriving Through Transition

1. PREPARE: LAST WILL AND TESTAMENT, DURABLE POWER OF ATTORNEY, HEALTH CARE PROXY AND DESIGNATION OF PERSONAL REPRESENTATIVE
2. BANK ACCOUNTS: PAID ON DEATH OPTIONS
3. BENEFICIARIES: UPDATE FOR LIFE INSURANCE, ANNUITIES, IRA, 401K
4. FUNERAL EXPENSES: PROVIDE INFORMATION TO FAMILY MEMBER
5. DESIGNATION OF PERSONAL PROPERTY, INCLUDING AUTOMOBILES
6. SAFE DEPOSIT BOXES/STORAGE: ADD ANOTHER PERSON
7. POST DIVORCE: UPDATE ALL ESTATE PLANNING DOCUMENTS AND BENEFICIARY DESIGNATIONS
8. DEBTS: ALL STATEMENTS FOR CREDIT CARDS AND LOANS
9. CHILDREN: (MINOR) UPDATE GUARDIANS AND CONSERVATORS
10. PASSWORDS: COMPILE ALL PASSWORDS FOR ALL ACCOUNTS AND A HARD COPY OF RECENT TAX RETURNS, FOR FAMILY SAFE KEEPING
11. ELDER PARENTS: INITIATE A CONVERSATION ABOUT ESTATE PLAN AND FUTURE CARE PLANS
12. STORE ALL DOCUMENTS ON A FLASH DRIVE OR CLOUD ACCOUNT

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