

## Compiling Your Vital Records

As your personal, financial, and legal records have grown in volume and importance over the years, the task of organizing such documents may seem overwhelming. And yet the importance of having your vital records readily accessible cannot be over-emphasized. In the event of your untimely incapacitation or death, your loved ones will need many of these documents to ensure that your wishes are carried out. You certainly don't want them to be burdened with locating numerous documents and records during such an emotionally difficult time.

By organizing your important records, you can express your wishes, such as how you want your property to be distributed, your intentions for life-sustaining measures, and any special preferences for your funeral and burial arrangements. By filing your documents in one convenient location, your heirs will be able to easily locate them. This helps ensure that your wishes are known and minimizes the risk of family disputes. This information will also help expedite the settlement of your estate upon your death.

Legal documents you and your spouse should compile include, but are not limited to, safe deposit box information, wills, living trusts, durable powers of attorney, durable powers of attorney for health care, living will/medical directives, and testamentary letters. In addition, your compiled records should include social security information, Medicare or health care information, emergency contact information, professional service provider information, adoption records, death certificates, passports, and naturalization papers. Finally, your financial information including bank and investment account statements should be readily available.

Organizing your essential records can also help you understand your financial picture, plan for the future, and communicate those plans to the appropriate individuals. Once you've completed this project, you will have the peace of mind in knowing that your affairs are in order. You may wish to tackle this project all at once or a little at a time, but once you've set a goal to compile and organize your important records, you should follow through with its completion.

Although you have a number of different ways to organize your important records, we encourage you to develop a system that works for you. If you save information on your computer, be sure to let your trusted loved ones know the login information and password.

If you have questions as you gather the documents and information, please do not hesitate to contact us. Best wishes as you embark upon this important project!