

# Foresters<sup>TM</sup> Financial Resolutions Checklist

Date: \_\_\_\_\_

Can you ever be too prepared in life? Why not start planning so that if anything happens to you, your family and loved ones will be looked after.

## Your Will

- Do you have a current one in place?  Y  N
- Have you named a guardian for any minor children?  Y  N
- Is it in a safe location?  Y  N
- Do your spouse, adult children, and/or executor know where to find it?  Y  N

## Your Funeral

- Have you shared your wishes with your family?  Y  N
- Have you thought of costs required or funeral expenses?  Y  N
- Have you put aside money for your funeral so it's available for your family?  Y  N

## Your basic Estate Planning ( Power of Attorney, Living Wills, Health Care Directives)

- Have you discussed these with your family?  Y  N
- Do you have the appropriate documents in place?  Y  N

## Your Assets

- Do you have a list of bank accounts, retirement funds, investments, and any relevant passwords?  Y  N
- Do you have record of all significant assets and property?  Y  N
- Do you have a contact list of bankers, lawyers and financial advisors?  Y  N

## Your Debts

- Do you have a list of all debts, due dates, and contact information?  Y  N
- Do you have life insurance to pay off your debts in the event of your death?  Y  N

## Your Insurance Certificates and Policies

- Do you have a record of all the insurance you own?  Y  N
- Do you have a contact list of your insurance advisors?  Y  N
- Have you talked to your life insurance advisor about the different types of certificates and policies available to help your loved ones when you pass away?  Y  N

## Your Employment and Government Benefits

- Do you have list of employer contacts to find out if there are any amounts owing in salary or vacation?  Y  N
- Are there any company death benefits your family should be aware of?  Y  N
- Does your family know they can apply for survivor pension benefits, such as social security survivor benefits?  Y  N

## Your Important Information

- Do you have all the important information for your loved ones, financial documents and your final requests in one place?  Y  N

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