

Is Your Family Prepared?

Use this checklist to make sure your loved ones know where to find the documents, accounts, and contacts that matter most — before they need them. Complete each item and note the location.

Document / Item	Where It Can Be Found	Done
Essential Legal Documents		
☐ Last Will & Testament	_____	☐
☐ Revocable Living Trust	_____	☐
☐ Durable Power of Attorney	_____	☐
☐ Healthcare / Medical Directive	_____	☐
☐ HIPAA Authorization Form	_____	☐
☐ Letter of Instruction / Final Wishes	_____	☐
Financial Accounts & Assets		
☐ Checking & Savings Accounts	_____	☐
☐ Investment / Brokerage Accounts	_____	☐
☐ 401(k) / 403(b) Plans	_____	☐
☐ IRA / Roth IRA Accounts	_____	☐
☐ Pension Plan Documents	_____	☐
☐ Annuity Contracts	_____	☐
☐ Stock Certificates / Options	_____	☐
☐ Cryptocurrency Holdings	_____	☐
Insurance Policies		
☐ Life Insurance Policy / Policies	_____	☐
☐ Long-Term Care Insurance	_____	☐
☐ Health Insurance Cards & Policy	_____	☐
☐ Homeowners / Renters Insurance	_____	☐
☐ Auto Insurance	_____	☐
☐ Umbrella / Liability Policy	_____	☐



Family Financial Conversation Checklist

Financial Awareness Month • April 2025

Document / Item	Where It Can Be Found	Done
Property & Debts		
☐ Real Estate Deeds / Titles	_____	☐
☐ Mortgage Documents	_____	☐
☐ Vehicle Titles	_____	☐
☐ Safe Deposit Box Key & Location	_____	☐
☐ Outstanding Loans / Lines of Credit	_____	☐
☐ Credit Card Accounts List	_____	☐
Beneficiary Designations		
☐ Life Insurance Beneficiaries Reviewed	_____	☐
☐ Retirement Account Beneficiaries Reviewed	_____	☐
☐ Transfer-on-Death (TOD) Accounts Reviewed	_____	☐
☐ Payable-on-Death (POD) Accounts Reviewed	_____	☐
Key Professional Contacts		
☐ Financial Advisor Name & Contact	_____	☐
☐ Estate Attorney Name & Contact	_____	☐
☐ Accountant / CPA Name & Contact	_____	☐
☐ Insurance Agent Name & Contact	_____	☐
☐ Executor of Estate	_____	☐
☐ Trustee (if applicable)	_____	☐
Digital & Account Access		
☐ Password Manager or Secure List Location	_____	☐
☐ Email Account(s)	_____	☐
☐ Online Banking Login Info	_____	☐
☐ Social Media Accounts	_____	☐
☐ Subscription Services	_____	☐

Ready to take the next step?

Schedule a complimentary Family Financial Review with Loftus Wealth Strategies. Contact us today — loftuswealth.com