



Your Family Love Drawer

In the spirit of our goal to provide solutions that help you achieve your goals, consider this: in the event of your death, would you want to envision adding financial pressure to the emotional loss and grieving of your survivors? Of course not. For this reason, we present the "Love Drawer". Make sure that your family can find all necessary details and instructions for all of your financial affairs. We invite you to gather the following items for your drawer:

- 1. The name and contact information for your Estate Planning Attorney*
- 2. A copy of your will and trust documents; and the exact location of the original*
- 3. The name and contact information for all of your insurance representatives*
- 4. The name and company contact information, account / policy numbers, and primary and contingent beneficiaries on each insurance policy and IRA*
- 5. The name and contact information of all investment advisors*
- 6. Human Resource Department contact information for your employer*
- 7. The complete details of all debts and corresponding contact information*
- 8. Copies of drivers license, passport, social security card, and birth certificate*
- 9. Copies of the deeds and titles for all assets of reasonable value*
- 10. A note indicating your burial preferences, if not outlined in your will*
- 11. Leaving a personal "love note" to important people in your life detailing your loving thoughts, words, ideas, and appreciation would likely be*

At least three people should be informed as to the location of the drawer. You may wish to ask them to please respect your privacy and never open the drawer unless necessary. As you periodically review and revise your financial affairs it is prudent to approach your "love drawer" in the same manner.

Although, the "love drawer" will take some time to establish, I think you will consider the time well spent providing peace of mind knowing your loved ones can easily handle all of your financial affairs without financial pressure, confusion, or disagreements. For your loved ones, they will have the gift of remembering you in a way that we all want to be remembered: as being kind, generous, and thoughtful for thinking to provide them with the ability to focus on what's most important at such a difficult time: celebrating the wonderful memories of your life.

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