*** The Talk***

*Important Family Matters*

When it comes to family, it’s hard to find the right time to talk about health care needs, finances and funeral plans. The topics seem sad and emotions can run high but it’s critical to have these conversations when everyone can express their wishes.  Talking today will help you avoid conflict or guesswork in the future. It will also help you identify gaps in your planning and allow you to take action to fill those gaps.

Planning for tomorrow can make a big difference in your family’s future. We have been helping Delaware families since 1992 – let us help you, too.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Record your names: |  | |  | |
| Social Security Numbers |  | |  | |
| **HEALTH CARE MATTERS**  **Record complete information here with names, phone numbers, any important notes and where you have filed/stored any documents.** | | | | |
| List your doctors and their phone numbers, starting with primary care. |  | |  | |
|  | |  | |
| Specialist 1 |  | |  | |
|  | |  | |
| Specialist 2 |  | |  | |
|  | |  | |
| Living Will: yes or no |  | |  | |
| Advanced Health Care Directive: yes or no |  | |  | |
| Long-term health insurance: yes or no |  | |  | |
| Policy number, agent and company |  | |  | |
|  | |  | |
| Life insurance: yes or no; are beneficiaries current? |  | |  | |
| Policy number, agent and company |  | |  | |
|  | |  | |
| Power of Attorney: yes or no |  | |  | |
| Organ Donor: yes or no |  | |  | |
| Other |  | |  | |
| Where are these documents located/stored? |  | |  | |
|  |  | |  | |
| **LEGAL ISSUES**  **It is important to keep your legal document in one place.** | | | | |
| Family/personal attorney (List name and phone number): |  | |  | |
|  | |  | |
| Estate Plan: yes or no |  | |  | |
| Estate Planner (List name and phone number): |  | |  | |
|  | |  | |
| Will: yes or no; are your beneficiaries current? |  | |  | |
| Where are your legal papers stored/filed? |  | |  | |
| Where are your birth certificate, Social Security card, marriage license? |  | |  | |
|  |  | |  | |
| **FINANCIAL INFORMATION** | | | | |
| List your bank accounts. | | | | | |
| Bank 1 |  | |  | |
| Bank 2 |  | |  | |
| Other |  | |  | |
| Safety deposit box: yes or no |  | |  | |
| Details |  | |  | |
| Financial planner (List name and phone number): |  | |  | |
| Where is the deed to the house or mortgage papers? |  | |  | |
| Second home |  | |  | |
| Other property | Address | | Contact person | |
|  | |  | |
| Timeshare? List address, contact information and any plans for the property. |  | |  | |
| Outstanding loan documents |  | |  | |
| Prenuptial Agreement (Where is it located?) |  | |  | |
| Divorce agreement (Where is it located?) |  | |  | |
| Tax returns (Where are your copies?) |  | |  | |
| Auto and homeowner insurance policies. Policy number, agent, company. |  | |  | |
| Pre-paid funeral arrangements: yes or no |  | |  | |
| Details |  | |  | |
| Other notes for funerals including favorite hymns/songs, scripture passages, etc. |  | |  | |
|  | | | | |
| **INCOME SOURCES**  **List sources of income and note if checks come in the mail or are deposited into a bank account; include which bank account.** | | | | | |
| Pension |  | |  | |
| Social Security |  | |  | |
| VA benefits |  | |  | |
| Other |  | |  | |
| List investment accounts |  | |  | |
| IRA |  | |  | |
| Stocks |  | |  | |
| Bonds |  | |  | |
| 401(k) |  | |  | |
| Other |  | |  | |
|  |  | |  | |
| **OTHER CONSIDERATIONS**  **Record other important information here.** | | | | | |
| Plans you have made to care for a loved one with special needs. |  | | | |
| Plans you have made for your pets. |  | | | | | |
| Cell phone: record number and carrier. |  | |  | |
|  | |  | |
| Social media: list accounts with user names and passwords. | Username | Password | Username | Password |
| Facebook |  |  |  |  |
| LinkedIn |  |  |  |  |
| Twitter |  |  |  |  |
| Other |  |  |  |  |