RETIREMENT CONSULTANTS

Leaving Your Legacy: Essential Documents & Planning Guide

A SIMPLE SYSTEM TO PROTECT WHAT MATTERS MOST

Having your important documents organized in one place brings peace of mind for both you and your loved ones. Use this checklist to build your Legacy Keeper today:

Essential Documents to Include

Financial Accounts

- Bank account information (checking, savings, CDs)
- Investment and brokerage account statements
- Retirement account details (PERS, TRS, FERS, TSP, 401(k), IRA)
- Deferred Compensation statements
- Life insurance policies and contact information
- Annuity contracts and beneficiary information
- Pension documents and beneficiary designations

Insurance & Benefits

- Health insurance cards and policy information
- Medicare cards and supplement policies
- Long-term care insurance policies
- Property and casualty insurance policies
- Union benefit information
- Federal/State employee benefit summaries
- Any Certificate of Release or Discharge from Military

Property & Debts

- Property deeds and mortgage documents
- Vehicle titles and registration
- List of outstanding debts and loan information
- Credit card account information
- Tax returns (last 3-7 years)

Legal Documents

- Will (original or certified copy)
- Trust documents
- Power of Attorney (financial and healthcare)
- Healthcare Directive/Living Will
- Marriage certificate and/or divorce decrees
- Birth certificates for all family members
- Social Security cards or numbers (secured separately)

Personal Information

- List of digital accounts and passwords (secured separately)
- Contact list (attorney, CPA, financial advisor, insurance agents)
- Funeral and burial preferences
- Location of safe deposit box and key

Pro Tips for Your Legacy Keeper

Choose the right container
Use a fireproof safe or file box that's easily accessible but secure.

Tell someone you trust
Make sure a family member or trusted friend knows where your Legacy Keeper is located.

Review annually
Set a calendar reminder to update documents and account information each year.

Keep copies
Store copies of critical documents with your attorney or in a secure cloud service.

Label your keys
Keys for file cabinets, vehicles, boats, locks, great grandma's trunk, etc.

Update after major life events
Marriage, divorce, birth, death, job changes, or moving should trigger a review.

Have Questions About Your Financial Legacy?

Building your Legacy Keeper is just one step in comprehensive estate planning. The advisors of SBS Retirement Consultants, help retirees create strategies aimed at protecting their assets and ensuring their wishes are honored.

Schedule your Complimentary Discovery Appointment today to review your estate planning strategy together and identify any gaps.

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