

If Something Happens To Me[®]

New Year's Checklist

If we've learned anything in recent years, it is that the unexpected should be pretty well expected by all of us. From health issues to hurricanes and everything in between, unexpected events can throw our lives into chaos. By taking a few simple steps, you can help to ensure that you and your family are prepared for whatever comes your way. Below are 5 tips for organizing your financial and legal affairs in the coming year.

- ❑ **Write down your account numbers.** Modern life comes with a lot of accounts. We all have checking accounts, retirement accounts, credit cards and usually many more. Organizing the details relating to all of these accounts can save a great deal of hassle and expense for your family if something were to happen to you.
- ❑ **Organize your documents into a grab-and-go case.** If the unexpected happens, you should be able to quickly access all of your important legal, financial and insurance paperwork. Items you might need in an emergency should be stored in a readily available, grab-and-go case.
- ❑ **Make a contact list.** If a disaster occurs, you will want to contact friends or relatives to let them know you are safe or to ask them for help. List their names, addresses and phone numbers, as well as the contact information for your trusted advisers.
- ❑ **Prepare a household inventory.** If your house burned down, you would have a difficult time remembering everything you had in order to make an insurance claim. You can avoid this problem by making either a written or video inventory of your home's contents.
- ❑ **Meet with your advisers.** After a death or disaster, you don't want to find out that your planning was deficient. Meet with your attorney, financial adviser and insurance adviser to make sure that your planning is complete and up to date.

Taking the steps above will enable you to quickly recover from a disaster and will protect your family if something happens to you.

To learn more about preparing for the unexpected or to purchase tools designed to help you organize your affairs, visit us on the web at www.IfSomethingHappensToMe.com.

Portions of the above information were excerpted from the book *If Something Happens To Me* as well as from the article "Seven Ways to Disaster-Proof Your Life" authored by Joseph Hearn and originally appearing in the AARP Bulletin.

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