

# HELP YOUR EXECUTOR - CREATE A ROADMAP

- Where is the will? Possibly in the safety deposit box but which bank and where is the key?
- Who is the lawyer that prepared the will?
- Do you have life insurance and, if so, where are the policies?
- Where do you keep copies of your old tax returns? Did you use a CPA to prepare them?
- Is there a balance sheet of your financial assets, such as bank accounts, brokerage accounts, IRA's, etc., so that nothing is missed?
- Are you carrying any debt, maybe on the last car you bought and where is the car title?
- Have you made any final arrangements?
- Where do keep your passwords to computers, credit cards, and so many other things in life these days?
- Who is supposed to get what in terms of jewelry, furniture, china, crystal, and so on?
- Do you have valuable art hanging on the walls that might be otherwise be destined for Goodwill?
- What about family heirlooms of sentimental value?
- Have you labeled family pictures of historical importance from back in the day when photos weren't just on your phone?
- Are there friends and family far away who need to be contacted?
- Have you written a personal message to your immediate family?