



## 4 Types of Legal Documents to Prepare

One part of planning your legacy and making your wishes known involves doing some digital and physical organizing.

Do you have all your key legal documents in an easily accessible but secure place?

Here is what to have on hand and what to keep in mind as you put your essential information in order.

### 1. Records

We manage much of our lives through personal and financial records. Examples of these types of documents include your:

- Birth certificate
- Marriage certificate
- Social Security card
- Medication information
- Health insurance
- Bank account information
- Investment and debt information
- Property deed

### 2. Beneficiary Designations

Keep clear documentation of your designated beneficiaries, the people you decide will inherit various assets. Select beneficiaries for all investment and bank accounts and your life insurance policy and be sure to keep these named beneficiaries up to date.

### 3. Will

Remember, a will can cover everything from the real estate you own to small items of sentimental value.

### 4. Advance Directives

An advance directive enables your loved ones to make decisions when you are unable to do so yourself. Consider designating:

- **Health care proxy.** A health care proxy can make medical decisions on your behalf.
- **Power of attorney.** The person you give power of attorney can make financial choices on your behalf.

### Organization Tips

Some basic organization can help keep your legal documents in order.

- Keep clearly labeled hard and digital copies of your important documents.
- Tell someone you trust the location of your legal documents.
- Regularly check important documents to ensure they are up to date.

Taking these steps to stay organized can help save time and stress in the future.

Do you have questions we can help with? Reach out anytime.

*The highest Compliment you can give your ROI Financial Advisor is to refer them to someone special like yourself. We thank you for your business & most recent consideration.*

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