

My financial life

A preplanner for your family's well-being

It's an uncomfortable topic. None of us wants to think about our own mortality. But it's especially during emotional times that people tend to make financial mistakes—mistakes that can undo years of planning.

By taking a little time now to complete this preplanner, you can greatly ease the burden on those you love and help simplify the process of getting your financial house in order. It's your life, your legacy, and your money. Take charge of it.

A NOTE ON PASSWORDS: Security experts typically advise against writing down and storing all your computer, financial account, and social media passwords in a single document like this preplanner. Instead, consider relying on a trusted password manager. For a small annual fee, these applications take the hassle out of managing all your usernames and passwords across multiple sites.

1. Personal information

a. Full name	
b. Birth date	
c. Social Security number	
d. Birth certificate location	
e. Driver's license number	
f. Medicare number	
g. Passport number & location	
Computer	Unlock code
Computer	Unlock code
Computer	Unlock code
Computer	Unlock code
Computer	Unlock code
Phone/Tablet	Unlock code
Phone/Tablet	Unlock code
Phone/Tablet	Unlock code
Phone/Tablet	Unlock code
h. Other	
i. Other	

2. Key contacts

Phone

URL

Phone

URL

Phone

URL

Phone

URL

Phone

URL

Phone

URL

Phone

URL

Phone

URL

Phone

URL

3. Financial account information

If possible, include copies of recent account statements, as these may provide important additional information to assist your beneficiaries.

Account number

Account number

Account number

Account number

Account number

Account number

Account number

4. Other income sources

a. **Social Security** account number
Social Security account number

b. **Military pension** service branch ID
Military pension service branch ID

c. **Employer pension** company name Employee ID
Contact name Phone
Email

Employer pension company name Employee ID
Contact name Phone
Email

d. **Other**

e. **Other**

5. Safe deposit box(es)

a. **Bank** Address
Box # Key location

Bank Address
Box # Key location

6. Home security

a. **Alarm system** Location
Access code

b. **Home safe** Location
Key location
Combination

c. **Other security considerations**
(e.g., firearms, opioids, poisons)

7. Other valuable assets

a. **Homes** (include copies of recent mortgage statements and/or property appraisals)

b. **Real estate** (include location of any other properties, deed and key locations, and alarm codes)

c. **Automobiles** (include make, model, year, VIN and location)

d. **Trust accounts** (include name of trust, account number, beneficiary, estimated value, trustee, and location of documents)

7. Other valuable assets (cont'd)

e. **Artwork** (include description, location, and written appraisal if applicable)

f. **Collections** (include description, location, and written appraisal if applicable)

g. **Other**

8. Digital assets

a. **Frequent flier program name** Account number

Frequent flier program name Account number

Frequent flier program name Account number

Frequent flier program name Account number

Frequent flier program name Account number

Frequent flier program name Account number

b. **Credit card points program** Account number

Credit card points program Account number

Credit card points program Account number

Credit card points program Account number

c. **Hotel reward points program** Account number

Hotel reward points program Account number

Hotel reward points program Account number

Hotel reward points program Account number

Hotel reward points program Account number

d. **Social media accounts** (e.g., Facebook, Twitter, Instagram)

Site User name Password

Site User name Password

Site User name Password

Site User name Password

Site User name Password

e. **TV/Movie/Music streaming services**

Site Account number

Site Account number

Site Account number

8. Digital assets (cont'd)

f. Online shopping accounts (e.g., Amazon, eBay, etc.)

Site	Account number
Site	Account number
Site	Account number

g. Retail loyalty programs

Site	Account number
Site	Account number
Site	Account number

h. Other

i. Other

9. Liabilities (credit cards, loans, home)

a. Institution name	Account number
Institution name	Account number
Institution name	Account number
Institution name	Account number
Institution name	Account number

10. Insurance

a. Health insurance company name

Address

Phone

Primary policy holder

Account/Policy number

Health insurance company name

Address

Phone

Primary policy holder

Account/Policy number

b. Homeowners insurance company name

Address

Phone

Primary policy holder

Account/Policy number

Homeowners insurance company name

Address

Phone

Primary policy holder

Account/Policy number

10. Insurance (cont'd)

c. Auto insurance company name

Address

Phone

Primary policy holder

Account/Policy number

Auto insurance company name

Address

Phone

Primary policy holder

Account/Policy number

d. Life insurance company name

Address

Phone

Primary policy holder

Account/Policy number

Life insurance company name

Address

Phone

Primary policy holder

Account/Policy number

e. Long-term care insurance company name

Address

Phone

Account/Policy number

Long-term care insurance company name

Address

Phone

Account/Policy number

f. Disability insurance company name

Address

Phone

Account/Policy number

Disability insurance company name

Address

Phone

Account/Policy number

g. Property/Casualty umbrella company name

Address

Phone

Account/Policy number

Property/Casualty umbrella company name

Address

Phone

Account/Policy number

h. Professional (e.g., malpractice) insurance company name

Address

Phone

Account/Policy number

i. Other

11. Monthly bills

a. Bill pay service company name (if applicable)

Automatically
charged

Drafted

Phone

b. Mortgage lender name

Account number

Due date

Avg. \$

Mortgage lender name

Account number

Due date

Avg. \$

c. Car payment name

Account number

Due date

Avg. \$

Car payment name

Account number

Due date

Avg. \$

d. Oil/Gas name

Account number

Due date

Avg. \$

Oil/Gas name

Account number

Due date

Avg. \$

e. Electric name

Account number

Due date

Avg. \$

Electric name

Account number

Due date

Avg. \$

f. Cable/Internet name

Account number

Due date

Avg. \$

Cable/Internet name

Account number

Due date

Avg. \$

g. Cell phone name

Account number

Due date

Avg. \$

Cell phone name

Account number

Due date

Avg. \$

h. Credit card name

Account number

Due date

Avg. \$

Credit card name

Account number

Due date

Avg. \$

Credit card name

Account number

Due date

Avg. \$

11. Monthly bills (cont'd)

Credit card name			Automatically charged	Drafted
Account number	Due date	Avg. \$		
Credit card name				
Account number	Due date	Avg. \$		
Credit card name				
Account number	Due date	Avg. \$		
Credit card name				
Account number	Due date	Avg. \$		
i. Other				
Account number	Due date	Avg. \$		
j. Other				
Account number	Due date	Avg. \$		
k. Other				
Account number	Due date	Avg. \$		
l. Other				
Account number	Due date	Avg. \$		

12. Post-mortem arrangements/instructions

Include copies of any pre-paid funeral/burial arrangements you may have made. Use this preplanner to store any sealed personal letters to loved ones and/or a letter of personal intent outlining values or wisdom you wish to impart, how you would like to be remembered, or wishes.

a. Donation of organs and/or my body (please check one)

I have a formal arrangement with _____ that will permit any of my bodily parts to be donated for science and/or the benefit of another person.

I have not entered into a formal arrangement but desire to donate any part of my body that can be used for science/the benefit of another person/etc.

I do not desire to have my organs/bodily parts donated.

b. Regarding my body (please check one)

I want to be cremated and:

I want my ashes scattered at/over the following location: _____

I want my ashes buried at the following location: _____

I would like for my family to retain my ashes.

I do not wish to be cremated.

I do not care whether or not I am cremated.

Initials

12. Post-mortem arrangements/instructions (cont'd)

c. Funeral arrangements (complete all that apply)

1. I have already made funeral pre-arrangements with _____ (funeral home), and you may contact _____ (name) at _____ (phone number) to discuss.
2. I have not made preburial arrangements, but prefer my family/executor engage _____ (funeral home) to handle my funeral proceedings.
3. I have a cemetery plot at _____ that I would like to be used for my burial.
4. I have made no arrangements and desire for my family to choose how to handle any and all funeral arrangements (Y/N):
5. I desire for a memorial service to be held at: _____
6. I would prefer to only have a graveside funeral service (in lieu of a memorial service or other funeral service) (Y/N):

d. Additional information

1. I have these special requests for any of the services listed in this section:
2. Where to send flowers/to whom to make donations:
3. Obituary information, including important organizations/people, military and/or career history, etc. (attach additional sheet if desired):

e. Information for a death certificate (complete in full)

1. My father's name is _____. He was born on _____ at _____.
He passed away on _____ at _____.
2. My mother's maiden name is _____. She was born on _____ at _____.
She passed away on _____ at _____.
3. My spouse's name is _____. He/She was born on _____ at _____.
He/She passed away on _____ at _____.
4. I was born on _____ at _____.

Initials

12. Post-mortem arrangements/instructions (cont'd)

f. Decisions deferred to family (choose one option, if desired)

I desire that _____ make these elections on my behalf. If _____ is not living at the time of my passing, then _____ shall make the final decision.

I desire for my children to make the decision regarding the above matters. If they are unable to come to a unanimous agreement, then a majority vote shall be held.

Personal message to my family and/or friends (attach a separate page if desired)

Initials

13. Important documents

Regardless of the complexity of your assets or your specific wealth-transfer goals, there are several important legal documents you will want to include in this kit to ensure your survivors have easy access to them:

a. Last will and testament – The legal document in which you (the testator) set forth how your probate property should be distributed at death. The will also names an executor/personal representative to settle the estate and appoints a guardian for any minor children.

Document location

Date of last update

b. Durable power of attorney – Allows you to appoint someone to serve as an agent to handle your financial affairs in the event you are incapacitated or otherwise unable to perform those duties.

Document location

Date of last update

c. Living will – Sometimes referred to as an advance healthcare directive, this legally binding document clearly articulates your wishes with respect to resuscitation, desired quality of life, and end-of-life treatments—including treatments you do not wish to receive—under certain dire medical conditions.

Document location

Date of last update

d. Healthcare power of attorney – A document in which you designate an agent to make health decisions on your behalf should you be rendered unable to do so yourself. In some states, the healthcare power of attorney is combined with a living will into a single document.

Document location

Date of last update

e. Insurance policies – Make sure to include copies of any term and/or permanent life insurance policies, as well as any separate long-term care coverage you might have.

Document location

Date of last update

14. Other documents

In addition to the above, if any of the following are applicable, please enclose copies:

- a. Trusts** – As well as dictating how your assets should be distributed to your beneficiaries, trusts can help provide for your spouse/partner and children if something happens to you, ensure the care of a loved one with special needs, protect your wealth from creditors/lawsuits/divorce, and provide a charitable legacy.
- b. Titles/Deeds/Certificates** – These will include titles to any properties and vehicles, deeds to land you own, as well as birth and marriage certificates.
- c. Most recent federal and state tax returns** – If you did not use an accountant to file your most recent tax returns, include copies in this kit.
- d. Marital property agreement** – If you currently live or have lived in a community property state while married, you should consider establishing a marital property agreement to clarify ownership of property between you and your spouse/partner during life and at death.

15. Beneficiary designations

Not all property is governed by a will or trust. Some assets (IRAs and life insurance death benefits) are distributed to whoever is the designated beneficiary. So, make sure you carefully review all beneficiary designations to make sure these assets will go to the intended beneficiary.

Along the way

If you have any questions or need assistance in gathering, organizing, or analyzing your financial information, reach out to your Truist advisor. They will be happy to assist you in all aspects of the estate planning process.

You can also visit our Emergency Preparedness page at [Truist.com/help-center/emergency-resources](https://truist.com/help-center/emergency-resources) for additional insights, advice, and contact information.

[Truist.com/wealth](https://truist.com/wealth)

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