

## An Estate Planning Resource

**ORGANIZE YOUR  
ESTATE PLANNING  
DOCUMENTS**

**IDENTIFY TRUSTED  
PERSONAL AND  
PROFESSIONAL  
ADVISORS**

**GATHER DETAILS  
ABOUT YOUR  
ASSETS**

**MAKE A LIST OF  
REAL ESTATE AND  
VEHICLES**







# LETTER FROM FIRST POINT FINANCIAL MANAGEMENT & TRUST SERVICES

It's important to have an estate plan. You want to make sure the assets you've worked so hard to accumulate during your lifetime go to the people or organizations you care about. Estate planning can be a complex process, but you can make it easier with the support of capable, experienced professionals.

*Organization is the Key* serves as a valuable guide for helping you gather the important documents and information individuals handling your estate will need.

Completing this guide is just the first step. Other steps involved in estate planning include:

- Review your beneficiaries and update them if necessary.
- Establish your directives, such as a Will, Trust, Power of Attorney, and Health Care Proxy. Everyone can benefit from having a Will, no matter how small their estate or simple their wishes.
- Determine specific needs for your family and pets and provide for them accordingly.
- Become familiar with estate tax laws and plan to minimize them if possible.
- Consider seeking professional help from a lawyer, accountant, and a First Point Financial Management & Trust Services advisor.
- Plan to reassess your estate plan periodically and make changes as necessary, especially after significant life events.

BEST REGARDS,

FIRST POINT FINANCIAL MANAGEMENT &  
TRUST SERVICES TEAM



When famous singer Aretha Franklin died intestate - without a legal will - in 2018, she joined a long list of prominent individuals who did the same. By not preparing an estate plan, she complicated the task of settling her affairs for her survivors.

While your estate may not be as large or complex as Aretha's, it's just as important to have a plan in place in the event of your death.

# TABLE OF Contents

---

5

FAMILY INFORMATION

7

TRUSTED ADVISORS

9

FINANCIAL ACCOUNTS

11

REGISTERED PROPERTY

13

LIABILITIES

15

DIGITAL ASSETS & ACCESS

6

MILITARY RECORD

8

CHECKLIST OF IMPORTANT  
DOCUMENTS

10

REAL ESTATE

12

INCOME SOURCES

14

INSURANCE POLICIES

16

NOTES





# IN THIS GUIDE

Some sections of this guide may not be applicable to you, and they can be left blank. If you need more space to answer a question, provide the details on a separate sheet of paper and attach it to this document; or you can put the information in the Notes section located at the end of this guide.

This document is a personal record and is not a legal document. It should be stored with a copy of your Will in a secure and private location until needed.

**Be sure to tell someone you know and trust where to find this document and your important papers.** You don't need to discuss the details of your private matters with others, but someone needs to know where your papers are kept so your affairs can be handled appropriately.



**Ensure your assets, including those that pass by beneficiary designation (e.g., retirement accounts and life insurance), will be distributed according to your wishes**



**Having a comprehensive estate plan in place can help you feel more secure about the future and confident your loved ones will be taken care of.**



# FAMILY Information



Family Member	Full Name	Social Security No.	Date of Birth	Phone No.	Email Address & Physical Address
Self					
Spouse/ Partner					
Father (if living)					
Mother (if living)					
First Child					
Second Child					
Third Child					

List any additional living children, grandchildren, siblings, and prior spouse(s) on a separate page or in the Notes section of this publication.



# MILITARY Record

	Military Service Information
VA File Number (if you have one)	
Branch of Service	
Dates of Service	
Date of Discharge	
Serial Number	
Rank at Discharge	
Location of Discharge Papers	
Disability Rating (if any)	
Pension Information	
Form DD214: Certificate of Release or Discharge from Active Duty	



# TRUSTED Advisors



Professional Team	Name of Personal or Professional Advisors	Affiliation/Office and Contact Information, Including Email Address
Accountant/CPA/Tax Preparer		
Attorney (Estate Planner)		
Banker		
Broker		
Executor of Your Will		
Financial Planner/Financial Advisor		
Insurance Agent		
Physician		
Religious or Spiritual Advisor		
Trustee of Your Trust		





# Checklist of Important Documents

Deciding where to store your estate planning documents is critical. Why? Because you want it to be easy for someone to find them after you die. Wherever you put them, a trusted relative or friend should be made aware of their location. Potential places for storage include a fireproof safe or safe deposit box.

- Advance Care Directive (Living Will)
- Birth Certificate
- Body Donation Consent Form
- Declaration of Designee for Final Disposition
- Divorce Degree (if applicable)
- Financial Power of Attorney
- Funeral Plan
- Health Care Power of Attorney
- Income Tax Returns
- Insurance policies
- Last Will & Testament (original, signed)
- Loan & Mortgage Documents & Deed
- Marriage Certificate(s)
- Military ID Card & Records
- Organ Donation Registration
- Personal Property Designations at Death
- Pet Information
- Prenuptial Agreement
- Social Security Card
- Trust(s)

**A successful estate plan includes provisions allowing your family or a trusted friend or advisor to access or control your assets, should you become unable to do so yourself.**







# REAL ESTATE

Type of Real Estate	Address	Legal Owner(s)	Location of Deed & Purchase Agreement
Primary Residence			
Second Home			
Rental Property			
Land			
Business Property			

	<b>Provide information about storage unit, including address, unit number and location of the key.</b>
Storage Unit	

List other real estate owned on a separate piece of paper or in the Notes section of this publication.





# REGISTERED Property



Type of Property	Registered Owner(s)	Year, Make & Model	VIN
Personal Vehicle #1			
Personal Vehicle #2			
Personal Vehicle #3			
Recreational Vehicle			
Boat			
Motorcycle, Scooter, Moped, Golf Cart			
Trailer			
Business Vehicle			
Location of Titles and Registration			

List other registered personal property on a separate piece of paper or in the Notes section of this publication.





# INCOME Sources



Income Source	Describe Your Income
Employment (salary and wages, overtime pay, bonuses, commissions)	
Self-Employment (sole proprietorship, partnerships, limited liability company, corporation, freelance)	
Government Assistance Programs (Military Pension, Social Security, Social Security Disability)	
Rental - Farm(s)	
Rental - Other property(ies)	
Retirement Plan, Pension, Annuity	
Investment	

List other income sources on a separate piece of paper or in the Notes section of this publication.



# LIABILITIES

List your personal liabilities. Examples include auto loans, credit card balances, mortgage(s), personal loans, personal/business/property taxes, and other consumer debt.

Liability Type	Describe Your Personal or Business Obligations and Liabilities



# INSURANCE Policies



Insurance Type	Insurance Provider	Agent	Policy Number	Location of Policy
Medicare	Centers for Medicare & Medicaid Services			
Dental				
Medical Supplement				
Prescription Drug				
Disability				
Home				
Renter's				
Prepaid Funeral Plan				
Vehicle				
Life				
Long-Term Care				



# DIGITAL Assets & Access



When it comes to online security, your passwords are your first line of defense. If passwords aren't strong and kept secure, cybercriminals and even neighbors or family members could gain unauthorized access to your accounts.

There are several different ways to hand over your digital assets and passwords to the executor, trustee, attorney or trusted family member as part of your estate plan.

1. If you use a password manager, you can explain how to log into your account; or many password managers have built-in sharing capabilities.
2. You can provide instructions and complete the list below and keep this page in a safe or safe deposit box alongside your Will.
3. You can create a simple spreadsheet in a file format that anyone can read (Excel or Google Sheets) and export it to a USB stick and store it securely in a safe. The original electronic file should not be stored on your computer, but a separate secure drive so the wrong person does not stumble upon it.

	<b>Username</b>	<b>Password</b>
Password Manager		
Email		
Computer & Tablet		
Mobile Phone		
Social Media		
Cloud Storage		
Online Banking		
Broker Account		





# NOTES



# NOTES



# NOTES



# NOTES





# NOTES



# NOTES



## Visit Us Online at [FNB247.com](http://FNB247.com)

- Meet our team.
- Read the educational articles.
- Learn about First Point Financial Management & Trust Services.
- View your existing Financial Management account online.
- Submit an inquiry form.
- Take advantage of a no-obligation consultation with our team of wealth advisors.

## Contact Us

Financial Management & Trust Services  
First National Bank  
405 5th Street  
Ames, IA 50010  
515-232-5561

