



Client Name _____ Today's Date _____

NAME	STATUS	ROLE
	Normal	Beneficiary (P)
RELATIONSHIP	Special Needs	Beneficiary (C)
	Estranged	Trustee (P)
DOB OR DATE OF TRUST	Disinherited	Trustee (C)
	Trust	Executor
CELL PHONE NUMBER		Custodian
		Caretaker
		Financial POA
		Medical POA

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General Directives



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FINANCIAL TEAM

Client Name _____ Today's Date _____

Use this general directive to write simple instructions to your family.

Suggestions: "Our wills are located in the file cabinet in the basement." Or something general like:
"We've made a good plan, if I die, call John's team at Cornerstone Financial."



GENERAL DIRECTIVE

Cornerstone Financial and LPL Financial do not provide legal advice or services.
Please consult your legal advisor regarding your specific situation.

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Planning



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Client Name _____ Today's Date _____

Financial Advisor _____ Today's Date _____

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Professional Contacts



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Client Name _____ Today's Date _____

Name	Role	Business Name	Phone

NOTES

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Summary of Accounts



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FINANCIAL TEAM

Client Name _____ Today's Date _____

Bank and Investment Accounts

Account Nickname	Custodian	Account #	Est Value
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Beneficiaries

Account Nickname	Custodian	Account #	Est Value
------------------	-----------	-----------	-----------

Beneficiaries

Account Nickname	Custodian	Account #	Est Value
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Beneficiaries

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Summary of Insurance



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Life Insurance

Insured	Type	Term of Policy	Death Benefit	Insurance Co	Annual Premium	Cash Value

Disability and LTCi

Insured	Insurance Type	Carrier	% or Daily \$	Premium	Elimin. Period	Benefit Paid

NOTES

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Getting Online



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One of the challenges that a surviving family member faces, is accessing your digital property.

Digital property includes your login credentials to various websites and systems, such as email. Understanding that passwords are a sensitive piece of information that should be protected, if you don't wish to write down your passwords here, you will need to keep them someplace. Again, assume that you have passed. How is someone going to access your digital property? Regardless if you wish to use this page to write down your passwords or not, in the least, I suggest that you document the existence of your digital property using this page. For example, you might hold a separate savings account at an obscure bank. And you might only have online access (no paper statements).



GETTING ONLINE