



# Later is Now

It's human nature to push off what isn't urgent. But now is the time to do the tedious work of inventorying your assets so that when you pass away, your loved ones won't be scrambling. This checklist is designed to help you gather these details together in one place. Store this confidential information in a secure and locked location to prevent fraud.

COMPLETED AS OF \_\_\_\_\_

## IMPORTANT CONTACTS

	Name	Phone	Email
Financial Advisor			
Power of Attorney - Healthcare			
Power of Attorney - Property			
Executor			
Successor Trustee			
Attorney			
Accountant			

## SAFE DEPOSIT BOX KEY AND LOCATION

Facility Name	Address	Box Number	Notes (key location, etc)

## IMPORTANT DOCUMENTS

- Last Will and Testament
- Revocable Trust
- Power of Attorney for Property
- Healthcare Power of Attorney (including Living Will and/or DNR documentation)
- Irrevocable Trust

## LOCATION OF DOCUMENTS







**PERSONAL PROPERTY**

Itemize any of the following, provide approximate value and any special instructions:

- Antiques
- Boats (include title and insurance)
- Cars (include title and insurance)
- Art
- Pets
- Other
- Collections (gold, coins, stamps, etc.)

Item	Value	Special Instructions

**INCOME/CHARITABLE ASSETS**

Itemize any sources of income or charitable assets, including but not limited to: Social Security, employment or pension income, donor advised funds, private family foundation, and other notes/loans/money owed to me.

Income / Assets	Value	Contact Person/Special Instructions



**ADDITIONAL INFORMATION**

*List any extra information you wish for your loved ones to know.*

Area for providing additional information, consisting of multiple horizontal lines for text entry.

**Life happens. Let's plan for it, together.**



1901 Butterfield Road, Suite 1000  
Downers Grove, IL 60515  
630-545-2200

1051 Perimeter Drive, Suite 1125  
Schaumburg, IL 60173  
847-413-8545

Investment advisory services provided through HT|TC Wealth Partners, an investment advisor registered with the U.S. Securities and Exchange Commission. Trust services and retirement plan services are provided by the Trust Company of Illinois, a trust company chartered by the Illinois Department of Financial and Professional Regulation. Past performance is not indicative of future results.