

Your Personal Roadmap

Keeping Your Loved Ones in the Loop



When a tragedy strikes a family, it is extremely difficult for loved ones to pick up the pieces and move on. In many cases, remaining family members may not know where to begin – literally. They may not know where to find important papers and documents, who to call or what to do next. The Personal Roadmap document can help organize your information to make it manageable in a time of need.

The Personal Roadmap contains:

- Contact information for family members and professionals that you have worked with as well as information about important documents and their location (wills, trusts, etc.).
- A complete listing of insurance policies and coverage you have in place and how to contact the insurance companies.
- A complete list of investments and other assets that you have with contact information for brokers, banks, advisors, etc.

In many households, one person usually takes the reins of the finances and some of you may know this

information off the top of your head, but for spouses or other loved ones who may end up needing to “pick up the pieces,” they will have no idea of where to begin.

Once you have compiled this information, **please** let the appropriate people in your family know where it is so they can access it when needed – remember, this does no good if others cannot access it when needed. Even if you are fit as a fiddle, make sure that your spouse or family members know how to handle your affairs if something were to happen to you.

Other Ways to be Prepared

In addition to the Personal Roadmap, a few other items are important to keep your affairs in order:

- An Emergency Fund: Liquid assets are critical during a time of need for remaining family members. In most cases it is advisable to have 6-12 months of living expenses accessible.
- Updated Wills: Too often people die either without a will or with an outdated will. It’s a good idea to personally review your will annually and review it with an attorney every five years (or sooner if circumstances dictate).

- Power of Attorneys (POAs), Health care directives and POAs: These documents are important during times of incapacity for others to handle your financial affairs as well as give direction to your preferred health care wishes.
- Care for Pets: While trivial to some, pet care is often overlooked. It’s best to prearrange care for your pets in case of incapacity or death.

Personal Roadmap

Family Information				
Name	Phone	Date of Birth	Social Security #	Organ Donor?
				Yes or No
				Yes or No
Children	Phone	Date of Birth	Social Security #	

Estate Planning		
Will (name of person)	Have a Will?	Location of Document
	Yes or No	
	Yes or No	
Durable Power of Attorney (name of person & POA)	Have a POA?	Location of Document
	Yes or No	
	Yes or No	
Healthcare POA (name of person & POA)	Have a Healthcare POA?	Location of Document
	Yes or No	
	Yes or No	
Living Will (name of person)	Have a Living Will?	Location of Document
	Yes or No	
	Yes or No	
Guardians for Minor Children (named in will)	Phone	
Trusts (name of trust)	Beneficiaries	Location of Document
Preferred Funeral Home	Phone	Location of Specific Directions for Funeral
Cemetery (name and plot #)	Phone	Tombstone Preferences

Personal Roadmap

Contacts			
Employer & Contact's Name	Phone	Oil/Gas Company	Phone
Power of Attorney	Phone	Electric Providers	Phone
		AC/Heating Maintenance Providers	Phone
Executor of Estate	Phone	Telephone/Cellular Providers	Phone
		Internet Providers	Phone
Family Doctor, Dentist, Other Physicians	Phone		
		Water/Sewer Providers	Phone
Attorney	Phone	Trash Service	Phone
Accountant	Phone	Lawn Care Service	Phone
Financial Advisor	Phone	Snow Removal Service	Phone
Insurance Agent	Phone	Cleaning Service	Phone
Other Contacts	Phone	Other Services	Phone

Personal Roadmap

Insurance Information

Health Insurance				
Insured	Insurance Company	Phone #	Policy #	Employer-Provided?
				Yes or No
				Yes or No

Life Insurance							
Insured	Insurance Company	Phone #	Policy #	Type ¹	Benefit \$	Beneficiaries	Agent

¹ Type: Whole, Term, UL, VUL, etc.; if Term indicate expiration date of term

Disability Insurance					
Insured	Term	Insurance Company	Phone #	Policy #	Employer-Provided?
	Short or Long				Yes or No
	Short or Long				Yes or No
	Short or Long				Yes or No
	Short or Long				Yes or No

Long Term Care				
Insured	Insurance Company	Phone #	Policy #	Agent

Other (Homeowners, Auto, Umbrella, etc.)				
Type	Insurance Company	Phone #	Policy #	Agent

Personal Roadmap

Real Estate		
Address	Ownership on Deed	Deed Location

Vehicles				
Make	Model	Year	Owner on Title	Location of Title and Vehicle

Debt				
Type ¹	Account Owner(s)	Financial Institution	Phone #	Account #

¹ Mortgage or other debt; can list credit cards

Personal Roadmap

Safe Deposit Box

Owner	Location	Phone #	Access Information

Home Safe

Location of Key/Combination

Home Security System Information

Company	Phone	Access Information

Other Information My Family Should Know

Social Security Administration can be contacted at 1-800-772-1213

This is just an example of the categories you may want to include. This document should be customized based upon your needs.