

LEGACY DRAWER

A fireproof locked box located in your home and should contain everything your spouse or family needs to know if you aren't around-**EVERYTHING** that has to do with your financial life should be in the drawer. It should be organized in a way that **ANYONE CAN FIND A SPECIFIC DOCUMENT IN 30 SECONDS**. All files should be clearly marked, in order, and easy for a grieving family member to find. Include the appropriate documents in an easy to understand format.

The LEGACY DRAWER should contain 11 things.

1. **COVER LETTER**-This is a simple letter stating the purpose of the Legacy Drawer. Just a way to introduce your loved ones to the contents of the drawer.
2. **WILL AND ESTATED PLANS**-All information pertaining to your will and estate, including names of the executor and Power of Attorney should be located in one file.
3. **FINANCIAL ACCOUNT**-Anything that has money in it and your name on it should be listed in the Legacy Drawer. This includes account names, amount and account numbers.
4. **FUNERAL INSTRUCTIONS**-ALL details and specifications for funeral plans should be listed so the family can fulfill your wishes. If you are married, you need one for you and one for your spouse.
5. **INSURANCE POLICIES**-All insurance information, including health, car, disability, term life, etc. should be combined into one single document for each reference. List the type of insurance, who the policy is for, contact information and policy numbers.
6. **IMPORTANT DOCUMENTS**-Any legal or other important documents you have should be noted in the file. This includes deeds, birth certificates, Social Security cards and titles.
7. **LEGACY LETTERS**-Since the intention behind the Legacy Drawer is to keep your legacy going after you and no longer here, it is a good idea to include letters to your loved ones.
8. **MONTHLY BUDGET**-Add a copy of your written budget, so your spouse or loved ones know how to operate your household once you are gone. This will help your family keep track of bills and focus on more important things.
9. **TAX RETURNS**-Keeping tax returns in your Legacy Drawer in case you are audited by the IRS.
10. **SAFE DEPOSIT BOX(ES)**-Keep copies of all your Legacy Drawer papers in a safe deposit box. Include information in your Legacy Drawer on where your safe deposit box (es) is/are and WHO has access to it/them.
11. **PASSWORDS**-Write down all passwords, combinations, usernames and PIN numbers. This information allows your loved ones access to any documents, money or information that is left when you are gone.