

GETTING YOUR AFFAIRS IN ORDER

A Mini Assessment Checklist

How prepared are you? Take a few minutes to find out.

Getting your affairs in order is about more than organizing paperwork. It means making sure important information, documents, decisions, and wishes are organized and can be found when they are needed.



Place a check beside each statement that you have already completed.

- ☐ 1. I have organized my important personal documents and records so they can be easily located when needed.
- ☐ 2. I know where my birth certificate, Social Security information, and other vital records are stored.
- ☐ 3. I have an up-to-date list of my bank, retirement, investment, and other financial accounts.
- ☐ 4. I have organized information about my regular bills, debts, and other financial obligations.
- ☐ 5. I have recorded information about my life, health, home, auto, and other insurance policies.
- ☐ 6. I have organized important information related to my home, property, and vehicles.
- ☐ 7. I have considered whether I need a will or other important legal documents and have taken steps to put them in place.
- ☐ 8. I have documented important medical information, including medications, physicians, and emergency contacts.
- ☐ 9. I have identified someone I trust to make financial or healthcare decisions for me if I am unable to make them myself.
- ☐ 10. I have organized information about important online and digital accounts so they can be handled appropriately if necessary.
- ☐ 11. I have made plans or preparations for my end-of-life wishes.
- ☐ 12. I have communicated my end-of-life wishes to someone I trust.
- ☐ 13. I have recorded the names and contact information of people my family may need to reach.
- ☐ 14. A trusted person knows where to find my important information and documents if I am unable to provide them.

HOW DID YOU DO?

Count the boxes you checked.

11–14 checked

You're well on your way.



You have taken many important steps toward getting your affairs in order. Take another look at the items you haven't checked and consider what may still need your attention.

6–10 checked

You've made a good start.



You have some important pieces in place, but there may be areas that still need attention. Continue working through them one step at a time.

0–5 checked

Now is a good time to begin.



Getting your affairs in order may seem like a big task, but it doesn't have to be done all at once. Start with one area and move forward one step at a time.

Ready to take the next step?

Getting Your Affairs in Order provides practical guidance to help you gather, record, and organize important information so that you and your loved ones can find what is needed when it matters most.

Learn more at LightTheWayBooks.com