

GET ORGANIZED!

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Being prepared and getting your affairs in order is only sensible. Of course, as we're all going to live forever - we avoid it like the plague!

Remember you might not be dead when your spouse/partner or beneficiaries may have to take over your affairs. For instance, if you were not able to talk because of a serious illness – someone is going to have to handle your affairs for you. Know who this is - and assign that person ahead of time - and please at least give them some clue what to do!

It's really surprising how many people forget small accounts (which mount up over the years), and the money is then left in limbo until the money is disbursed to government or banks.

It's so important for both spouses to know how to draw money from the bank, make bank transfers, pay bills, etc. Don't leave it up to the other partner to do it all. Learn how to do on-line banking, e-mailing, etc. Help each other.

Things to think about
Make sure you have written down details of all your banking, investment and pension information that will be needed by your spouse/partner or beneficiaries when or if they have to take over your affairs.
(If it helps you, use the form available from the Lakeside Women website – LW_Personal Info.doc.)
If you have important documents such as:
• Deeds to the house (originals)
• Car ownership papers (originals)
• Car importation documents (originals)
• Passports (originals)
• FM3/2 documents (originals)
• Drivers license (s) (originals)
• Original Marriage License or Certificate of Marriage
• Original Divorce documentation (if appropriate)
• Original Birth Certificate
• Copies of Wills, Power of Attorney, etc.
• Copies of completed Life Planning Documents (LCS forms)
• Jewelry (valuable or of importance)
• Other valuables
• Or anything else that will be needed to be found when you're "gone" – whether dead or unable to handle your own affairs

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Make a detailed list of where each of these documents or items are stored. You can use the form below if that helps you.
Make sure your spouse/partner or beneficiaries know where this information is kept (complete the form below or use whatever other method you want), so that they can find this information quickly and without worry. Consider sending them a copy of the form below.
Please write down where this information is kept - because we all become forgetful...
If you have a safe, make sure your spouse/partner or beneficiaries know the combination and location of any key

Type of document or item	Location
Deeds to the house (originals)	
Deeds to the house (copies)	
Contract of agreement with maid or gardener (if any)	
Car ownership papers (originals)	
Car ownership papers (copies) Preferably notarized copies	
Car importation documents (originals)	
Car insurance policy papers (originals)	
Passports (originals)	
Passports (copies) Preferably notarized copies	
FM3/2 documents (originals)	
FM3/2 documents (copies) Preferably notarized copies	
Drivers license (s) (originals)	
Drivers license (s) (copies)	
Original Marriage License or Certificate of Marriage	

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Type of document or item	Location
Original Divorce documentation	
Original Birth Certificate	
Copies of Wills, Power of Attorney, etc.	
Copies of completed Life Planning Documents (LCS forms)	
Jewelry (valuable or of importance)	
Other valuables	
Or anything else that will be needed to be found when you're "gone" – whether dead or unable to handle your own affairs	

Things to consider
How would your spouse manage running the house if you were not able to do it?
Someone would have to continue paying the maid and gardener for instance. Does he/she know how?
Someone would have to continue paying house bills (electric, phone, gas etc.) Does he/she know how?
Is he/she capable of taking out the trash etc.? Could the gardener do this?
Consider paying a company to pay the household expenses for you. They would then deal with paying the gardener and maid, all the bills and would be available to have things fixed when broken. (Roma Management – 766-3163 can help you.)
Make sure you have someone who is qualified to help you with legal matters and that you have both met that person. Keep their phone number in a place where you can easily find it.
Make sure you have both met the person who looks after your bank accounts at the local bank
Make sure you have both met the person who looks after your health insurance policies (locally) and know how to contact them in an emergency.
Make sure you have both met the person who looks after your local insurance policies (for house and car insurance)

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Things to consider
If something happened to you both, what would happen to your pets? Please give this some consideration because the animal shelters can't necessarily find homes for your pets – they may be put down.
Do you want to leave money to local charities? Have you put this in writing and added it to your Will?
Do you want to leave any special belongings to particular friends?
What about your jewelry? Who is to get that? (You'd be surprised how this can cause family rows otherwise!) It's a good idea to list valuable items and either give them to the family member in person before you get sick, or get it written down and added to your Will.
Do you want anything special or money to be given to your maid or gardener? Or to their children?