

Get organized, for yourself and your loved ones

Maintaining important documents and sharing key information will provide peace of mind should anything unexpected occur. Be sure to periodically walk a spouse, partner, adult child or trusted friend or advisor through legal and financial records, PIN numbers, passwords and other personal information. Complete the tasks below to get started.

To-do	Task	Completed
File and protect important documents	<p>Designate a binder to hold all bills and paper statements.</p> <p>Keep legal documents, tax information and permanent records in a fire-safe box in your home, or in a safety deposit box.</p>	<input type="checkbox"/>
Go paperless	<p>Register for online accounts to reduce paper and provide consolidated sources of information.</p>	<input type="checkbox"/>
Automate whenever possible	<p>Sign up for automatic deposits, including paychecks, Social Security and tax refunds.</p>	<input type="checkbox"/>
Catalog accounts and key documents	<p>Keep track of what's in your safety deposit box, and share it with trusted family members or friends.</p> <p>Include a list of account numbers, descriptions, passwords and PINs in your safe or safety deposit box.</p>	<input type="checkbox"/>
Maintain current estate plans	<p>Make sure your will or trust is current.</p> <p>Update retirement accounts to reflect correct beneficiary information.</p>	<input type="checkbox"/>
Plan ahead	<p>Designate a power of attorney and consider a living will or health care directive.</p> <p>Write down contact information for your attorney, financial advisor and accountant and share this information with your heirs.</p> <p>Provide your most trusted loved ones and/or advisor with the combination to your home safe or access to a safety deposit box.</p>	<input type="checkbox"/>

For additional assistance organizing and consolidating your finances, contact an Ameriprise financial advisor.

Neither Ameriprise Financial Services, Inc., nor its advisors or representatives provide tax or legal advice. Clients should always consult with their tax or legal advisors concerning their situation.

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