

WHEN I'M GONE GUIDE

At Maestro Associates, we aim to help our Clients achieve their Ideal Life. For many of our Clients, they want to reach a stage where everything in their financial world is on autopilot. While we work to accomplish this for our Clients and their families on the financial side, both before and after death, there are several things that can be completed at home to help prepare for the inevitable.

The following is a list of items to be included in a file, both digitally and as a hard copy, as an immediate reference for your family in the unfortunate event of your inability to run your household.

MAESTRO ASSOCIATES MEETING BINDER

We aim to have our Meeting Binder be a “one-stop shop” and the first reference for our Clients and their families when questions about the financial household arise. In our Binder, you should find:

- ☐ Maestro Associates contact information
- ☐ Most recent Key Reports showing assets, debts, insurance, etc.
- ☐ Most recent Meeting Packet reports and Action Items

BUSINESS DOCUMENTS

- ☐ Shareholder Agreement(s)
- ☐ Contact list of key executives and board members
- ☐ Contact list of key business advisors (attorney, banker, insurance agent, etc.)
- ☐ Employment Agreement
- ☐ Recent company valuation

CODES, KEYS & PASSWORDS

- ☐ Safes, safe deposit boxes, lockboxes, etc.
- ☐ All online bank accounts
- ☐ All online bill payment accounts
- ☐ Email accounts
- ☐ Cloud/database storage
- ☐ Electronic devices (computers, tablets, phones, etc.)

CONTACT INFORMATION

- ☐ Immediate family
- ☐ Close friends
- ☐ Distant family
- ☐ Close business associates
- ☐ Medical professionals (doctors, dentist, therapist, pharmacy, etc.)
- ☐ Personal advisors (financial planners, estate planner, insurance agent, tax professional, etc.)

ESTATE & TRUST DOCUMENTS

- ☐ Estate Planner's contact information
- ☐ Will
- ☐ Trust
- ☐ Powers of Attorney
- ☐ Do Not Resuscitate document
- ☐ List of beneficiaries, with contact information
- ☐ List of all valuable personal items and location
- ☐ Memorial service arrangements

FINANCIAL INFORMATION

the "Assets Summary" in the Maestro Associates Meeting Binder should contain a list of most accounts

- ☐ List of all accounts (assets and debts)
- ☐ List of any personal cash and location
- ☐ Copy of accounting files
- ☐ List of recurring bills, due dates, and payment instructions

IMPORTANT DOCUMENTS

- ☐ Birth certificates
- ☐ Social Security cards
- ☐ Passports
- ☐ Identification cards
- ☐ Titles to cars, real estate, etc.
- ☐ Military documents
- ☐ Divorce and/or alimony documents
- ☐ Child custody and/or support documents
- ☐ Adoption documents

INSURANCE DOCUMENTS

the “Insurance Summary” in the Maestro Associates Meeting Binder should contain a list of most insurance policies

- ☐ Life insurance policies
- ☐ Long-term care insurance policies
- ☐ Disability insurance policies
- ☐ Health, dental, Medicare, & supplement insurance policies
- ☐ Homeowners insurance policies
- ☐ Auto insurance policies
- ☐ Umbrella insurance policies

MEDICAL INFORMATION

- ☐ All doctor contact information
- ☐ List of subscriptions and instructions

TAX DOCUMENTS

- ☐ Tax Planner’s contact information
- ☐ Tax returns (personal & business) for last three years

If you or your family have any questions or would like any assistance in preparing this information, please do not hesitate to contact our office.

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