Financial Empowerment

Where Everything Is

One page for the spouse who doesn't usually handle the money

Fill this out together, at the kitchen table, in about twenty minutes. It is a map, not a vault. Write down where things are and who to call, and leave account numbers, passwords, and Social Security numbers off the page entirely. Keep the finished sheet where you both can find it, and tell one trusted person outside the house that it exists.

WHERE THE MONEY LIVES

One line per institution. Not per account.

INSTITUTION	WHAT'S THERE

INCOME THAT KEEPS ARRIVING

What comes in every month, and what happens to it if one of you dies.

SOURCE	WHO TO NOTIFY
Social Security	
Pension	
Annuity	
Rental or other	
Withdrawals from savings	

DIGITAL ACCESS

Where the keys are kept, never the keys themselves.

- Password manager
- Master key kept at
- Phone for security codes
- Email on the accounts

WHO TO CALL

The people who already know your situation.

ROLE	NAME AND PHONE
Financial advisor	
CPA / tax preparer	
Estate attorney	
Insurance agent	
Employer benefits line	
Executor / trustee	

WHERE THE DOCUMENTS ARE

Check what exists. Then write down the one place they're kept.

- ☐ Will
- ☐ Revocable trust
- ☐ Financial power of attorney
- ☐ Medical directive
- ☐ Life insurance policies
- ☐ Long-term care policy
- ☐ Deeds and titles
- ☐ Last two tax returns
- ☐ Marriage / military records
- ☐ Safe deposit box key

They are kept

Who else knows that

THE THREE CALLS IN THE FIRST WEEK

In order. Ask the funeral home for ten certified death certificates.

1. Funeral home
2. Employer benefits
3. Social Security

Filled out on _____ **Reviewed on** _____ **Next review** _____
once a year

Questions you've been a little hesitant to ask are the ones worth asking out loud. Bring this page to a conversation:
calendly.com/matthewgagnon/prospect_fit

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