

LIFE

IN

MOTION

A GUIDE

FOR GATHERING LIFE'S
VITAL INFORMATION

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FINANCIAL RECORDS

In this section, you will document information related to your assets and liabilities — what you have, and what you owe. You will record information to share with financial advisors, your power of attorney, family, or anyone else who helps you (or will help you) manage your financial life.

This includes information about:

- ◆ Bank accounts and investments
- ◆ Income and benefits due to you
- ◆ Non-property assets and insurance
- ◆ Debts
- ◆ Loyalty programs

REMINDER

If something is not relevant to you, pull out the page or skip the section. You may also need to make extra copies of certain pages if you need more space.

WORD OF CAUTION

- ◆ Keep this book somewhere safe, and only share its location with those closest to you who may need it in case of emergency.
- ◆ This book has some sensitive information in it, but is designed to NOT be a 'key' to your world. Store passwords separately.



FINANCIAL RECORDS WORKSHEET Use this worksheet to determine which of the forms in this section are relevant for you. You may need to make copies of some forms if you have more accounts than can fit on the page. Items with an (*) are available upon request at lifeinmotionguide.com/contact.

	Have	Don't Have	Don't Know	How many?
Bank Accounts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Investment Accounts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
401k account(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
529 account(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Employer profit sharing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Annuity /Annuities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Safe Deposit Box	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Trust(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Stocks or Options (Individually held)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Bonds (individually held)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Credit cards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Long term care insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Umbrella insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Disability insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Loyalty programs (air, hotel, auto, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Certificate(s) of deposit*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Loans and lines of credit*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Lawsuits and claims against you*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Judgments*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Business interests*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Patents*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Copyrights*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Royalty agreements*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Expected inheritances*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____



INCOME SOURCES

Employer(s) Not Applicable

Employer Name Employed By Retired From

Phone Number

Employee ID Number

Employment Type Benefits Active?
 Yes No

Employer Name Employed By Retired From

Phone Number

Employee ID Number

Employment Type Benefits Active?
 Yes No

Other Income *Other income types might include social security, pensions, annuities, investment or trust income, reverse mortgages, veteran’s compensation benefits, rental income, etc.*

Name

Phone Number

Account Number

Type / Source of Income

How Received (Mail / Direct Deposit / Other)

Where Received (Address or Account Name)

Name

Phone Number

Account Number

Type / Source of Income

How Received (Mail / Direct Deposit / Other)

Where Received (Address or Account Name)



INVESTMENTS *Include individually held stocks, options, and bonds, 529, 401(k), or IRA accounts, money market funds, Treasury bonds, or other investments. Use the quick summary to determine how many copies you need before starting – you'll need one copy per institution.*

Institution

Phone Number

Investment Type

Sole Ownership? Yes No

Account Number

Username

Additional Account Owner Name

Additional Account Owner Name

Beneficiaries Designated? Yes No

Investment Type

Sole Ownership? Yes No

Account Number

Username

Additional Account Owner Name

Additional Account Owner Name

Beneficiaries Designated? Yes No

Investment Type

Sole Ownership? Yes No

Account Number

Username

Additional Account Owner Name

Additional Account Owner Name

Beneficiaries Designated? Yes No



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Institution

Phone Number

Investment Type

Sole Ownership? Yes No

Account Number

Username

Additional Account Owner Name

Additional Account Owner Name

Beneficiaries Designated? Yes No

Investment Type

Sole Ownership? Yes No

Account Number

Username

Additional Account Owner Name

Additional Account Owner Name

Beneficiaries Designated? Yes No

Investment Type

Sole Ownership? Yes No

Account Number

Username

Additional Account Owner Name

Additional Account Owner Name

Beneficiaries Designated? Yes No



FINANCIAL ACCOUNTS *Include bank accounts or digital payment platform account information. You'll need one copy per institution.*

Institution

Phone Number

Account Type

Sole Ownership? Yes No

Account Number

Username

Additional Account Owner Name

Additional Account Owner Name

Account Type

Sole Ownership? Yes No

Account Number

Username

Additional Account Owner Name

Additional Account Owner Name

Account Type

Sole Ownership? Yes No

Account Number

Username

Additional Account Owner Name

Additional Account Owner Name

Account Type

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Account Number

Username

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Account Type

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Account Number

Username

Additional Account Owner Name

Additional Account Owner Name

Account Type

Sole Ownership? Yes No

Account Number

Username

Additional Account Owner Name

Additional Account Owner Name

Account Type

Sole Ownership? Yes No

Account Number

Username

Additional Account Owner Name

Additional Account Owner Name

Account Type

Sole Ownership? Yes No

Account Number

Username

Additional Account Owner Name

Additional Account Owner Name



PERSONAL INSURANCE *Include whole, term, disability, long term care, or other personal insurance. Record property-related insurance policy information in the Household and Property section and health insurance in the Health section.*

Type of Policy

Name of Insured

Name of Carrier Auto-pay? Yes No

Phone Number

Policy Number

Username

Agent Name

Phone Number

Beneficiaries Designated? Yes No

Type of Policy

Name of Insured

Name of Carrier Auto-pay? Yes No

Phone Number

Policy Number

Username

Agent Name

Phone Number

Beneficiaries Designated? Yes No

Type of Policy

Name of Insured

Name of Carrier Auto-pay? Yes No

Phone Number

Policy Number

Username

Agent Name

Phone Number

Beneficiaries Designated? Yes No



LOYALTY PROGRAMS *Include airline, hotel, car rental, food and beverage, or other loyalty programs.*

Company

Phone Number

Card / Membership Number

Username

Company

Phone Number

Card / Membership Number

Username

Company

Phone Number

Card / Membership Number

Username

Company

Phone Number

Card / Membership Number

Username

Company

Phone Number

Card / Membership Number

Username

Company

Phone Number

Card / Membership Number

Username



CREDIT AND DEBIT CARDS

Issuer and Type of Card

Phone Number

Card Number

Username

Issuer and Type of Card

Phone Number

Card Number

Username

Issuer and Type of Card

Phone Number

Card Number

Username

Issuer and Type of Card

Phone Number

Card Number

Username

Issuer and Type of Card

Phone Number

Card Number

Username



LOANS AND LINES OF CREDIT

_____ Name of Lender	_____ Phone Number
_____ Account Number	_____ Username

Location of Agreement / Summary of Terms

_____ Name of Lender	_____ Phone Number
_____ Account Number	_____ Username

Location of Agreement / Summary of Terms

_____ Name of Lender	_____ Phone Number
_____ Account Number	_____ Username

Location of Agreement / Summary of Terms

_____ Name of Lender	_____ Phone Number
_____ Account Number	_____ Username

Location of Agreement / Summary of Terms



PROFESSIONAL ADVISORS

Accountant Not Applicable

Name

Company / Affiliation

Phone Number

Cell / Emergency Phone Number

Financial Advisor Not Applicable

Name

Company / Affiliation

Phone Number

Cell / Emergency Phone Number

Attorney Not Applicable

Name

Company / Affiliation

Phone Number

Cell / Emergency Phone Number

Banker Not Applicable

Name

Company / Affiliation

Phone Number

Cell / Emergency Phone Number

Insurance Agent Not Applicable

Name

Company / Affiliation

Phone Number

Cell / Emergency Phone Number



NEXT STEPS

Done? Great job! If you've completed the forms in this section, you've done the heavy lifting. If you keep it updated, it will save you time when things change in your life. Some additional considerations to ease transitions:

- ◆ Update (or create) your **estate documents** to accurately reflect what you want to happen to your assets when you die. Go back to the beginning of the book and review *If You Do Nothing Else* in the introduction section if you're not sure what the essential estate planning documents are.
- ◆ **Review your trust funding.** If you have a trust, it's a good idea to periodically review your assets and make sure they are titled in the name of the trust.
- ◆ **Review beneficiary designations.** Procedures for changing beneficiary designations will differ for each institution. In some cases, you can do this online, in others you will need to fill out a form. You'll need to do this for each account and for each institution where you have accounts. While you're calling, ask about procedures to **authorize your Power of Attorney** to access the accounts.
- ◆ **Streamline your accounts.** Are there accounts that can be consolidated or closed to reduce expenses or simplify your financial life? Do it!
- ◆ **Share information** with those you'll rely on for help managing your financial matters. Introduce your power of attorney to your professional advisors. Let those closest to you know who you've chosen to be your power of attorney and executor (or trustee.) Make sure your executor or trustee knows how to access your original will or trust documents when you die.

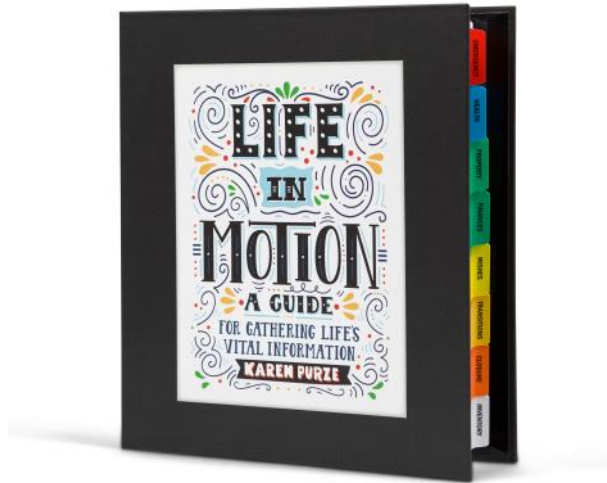


FINANCIAL AND ESTATE DOCUMENT INVENTORY

	Have	Need	Don't Need	Location
Power of Attorney	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Pre-arranged funeral agreement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Pre-paid cremation agreement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Obituary	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Will	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Codicil(s) ¹	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Trust agreement(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Checkbook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Income Tax returns (last 3 years)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Gift Tax Returns (last 3 years)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Savings Bonds	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Business agreements and contracts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Business licenses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Stock Certificates	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Royalty agreements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____

¹ A codicil is an addition or supplement that explains, modifies, or revokes a will (or part of one)

LIKE WHAT YOU SEE? GET THE WHOLE GUIDE.



Life in Motion is a guided workbook to help you get personal information organized so it's ready when you or your family need it.

It has all the forms, checklists, and document inventory sheets you need to quickly record your most important personal information:

- ◆ Emergency Plans
- ◆ Personal Health Record
- ◆ Property Information
- ◆ Financial Assets (and Liabilities)
- ◆ Final Wishes

GET YOURS AT LIFEINMOTIONGUIDE.COM
OR CALL (312) 373-0275 FOR MORE INFO