

"By failing to prepare, you are preparing to fail."  
-Benjamin Franklin



## Important Family Information

# NEST EGG FAMILY GUIDE

It's Free... Take advantage of this free guide. It is a roadmap for your spouse and family to know where things you've saved (important documents) are located. Download it, print it, **fill out the parts that pertain to you**, and keep it in a safe place, especially since it is a sensitive document. Allow someone you trust to know where that safe place is; so it may be accessed when the time comes.

Unfortunately, one of the topics of discussion so many couples and families fail to talk about is what to do when one of them dies. Knowing the names and phone numbers of who to contact, and where certain financial and legal documents are located, and what the secret computer passwords are, and the beneficiary designations, is vital and necessary information to provide for the survivors.

It is a fact according to mortality tables and government statistics that women on average outlive men by over 2 years and are usually the one left with more responsibilities and needs to be taken care of.

Most people know that as we age we acquire lots of things, and as these things accumulate, it becomes more difficult to keep track of them. Your garage is probably chocked full of items you've stored for years that you forgot all about. This can apply to your financial records as well.

Hopefully, these items are good things that we wish to pass to our spouse and heirs when we die. For our purposes here, let's call these things we acquire 'EGGS'. How many times have you heard... "How do you want your eggs?" Well, in this example, we don't want 'scrambled'. Also, we don't want to go on an Easter egg hunt to find them.

Unfortunately...

That 's what happens to many people when their spouse dies and prior planning was overlooked. They become victims of creditors and predators that are looking for the golden eggs you have saved and protected all those years. Simply put; if you don't have a written plan guiding your spouse or family members to where the eggs are (hidden), then the eggs may become rotten, or lost forever.

Your spouse and loved ones need guidance at this most difficult time. Let your spouse and family be the beneficiary of good planning, not the victim of poor planning. Prevent creditors and predators from taking advantage at an emotional time. Prepare in advance before it's too late.

So, we at Nest Egg Insured, provide this Family Guide free of charge to you to help you solve this matter, and prevent a family problem or crisis.



[www.NestEggInsured.com](http://www.NestEggInsured.com) • "Protect Your Nest"

"Nothing preaches better than the act."  
-Benjamin Franklin



### My/Our Information

Date:	My Full Legal Name:
Other Names I Have Used (Maiden, etc.):	
Social Security Number:	Place of Birth:
Birth Date:	Present Address:
Spouse's Full Legal Name:	
Other Names Spouse Has Used (Maiden, etc.):	
Spouse's Social Security Number:	
Spouse's Birth Date:	Spouse's Place Of Birth:
My Medicare Number:	Spouse's Medicare Number:

### Children

1. Full Legal Name:	
Date of Birth:	Social Security Number:
Marital Status: <input type="checkbox"/> Married <input type="checkbox"/> Single <input type="checkbox"/> Special Needs <input type="checkbox"/> Dependent <input type="checkbox"/> Exclude	
Phone:	Address:
Origin: <input type="checkbox"/> Child of Present Marriage <input type="checkbox"/> Child of Past Marriage or Relationship <input type="checkbox"/> Deceased	
2. Full Legal Name:	
Date of Birth:	Social Security Number:
Marital Status: <input type="checkbox"/> Married <input type="checkbox"/> Single <input type="checkbox"/> Special Needs <input type="checkbox"/> Dependent <input type="checkbox"/> Exclude	
Phone:	Address:
Origin: <input type="checkbox"/> Child of Present Marriage <input type="checkbox"/> Child of Past Marriage or Relationship <input type="checkbox"/> Deceased	
3. Full Legal Name:	
Date of Birth:	Social Security Number:
Marital Status: <input type="checkbox"/> Married <input type="checkbox"/> Single <input type="checkbox"/> Special Needs <input type="checkbox"/> Dependent <input type="checkbox"/> Exclude	
Phone:	Address:
Origin: <input type="checkbox"/> Child of Present Marriage <input type="checkbox"/> Child of Past Marriage or Relationship <input type="checkbox"/> Deceased	
4. Full Legal Name:	
Date of Birth:	Social Security Number:
Marital Status: <input type="checkbox"/> Married <input type="checkbox"/> Single <input type="checkbox"/> Special Needs <input type="checkbox"/> Dependent <input type="checkbox"/> Exclude	
Phone:	Address:
Origin: <input type="checkbox"/> Child of Present Marriage <input type="checkbox"/> Child of Past Marriage or Relationship <input type="checkbox"/> Deceased	

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"There are three great friends: an old wife, an old dog, and ready money."

-Benjamin Franklin



## Professional Contacts

### Estate Executor

Name:

Relationship:

Address:

Phone:

Email Address:

### Life & Annuity Insurance Agent

Name:

Company:

Address:

Phone:

Email Address:

### Successor Estate Executor

Name:

Relationship:

Address:

Phone:

Email Address:

### Property & Casualty Health Insurance

Name:

Company:

Address:

Phone:

Email Address:

### Attorney

Name:

Company:

Address:

Phone:

Email Address:

### Financial Planer

Name:

Company:

Address:

Phone:

Email Address:

### Clergy

Name:

Company:

Address:

Phone:

Email Address:

### Accountant

Name:

Institution:

Address:

Phone:

Email Address:

### Primary Doctor

Name:

Office:

Address:

Phone:

Email Address:

### Spouse's Primary Doctor

Name:

Office:

Address:

Phone:

Email Address:

"The only thing more expensive than education  
is ignorance."  
-Benjamin Franklin



## Important & Legal Documents: Locations

Documents		
	Date Signed	Location
Will		
Living Will		
Medical Directive		
Medical Power of Attorney		
General Power of Attorney		
Medical/Dental Records		
Medicare Card		
Trust Agreement		
Income Tax Returns		
Marriage License		
Pre-Nuptial Agreement		
Post-Nuptial Agreement		
Divorce Decree or Settlement		
Birth Certificate(s)		
Social Security Card		
Driver's License		
Passport		
Citizenship Papers		
Child Adoption Papers		
Baptism/Religious Certificate(s)		
Retirement Plan Beneficiary Designation		
Life Insurance Beneficiary Designation		
Military Service/Discharge Papers		

## Assets

Bank Accounts				
Name of Bank	Account #	Type of Account (Savings/Checking/CD)	Location of Statements	Contact Information

"The doors of wisdom are never shut."  
-Benjamin Franklin



## Assets (Continued)

### Securities

Financial Institution	Account #	Investment Type (Stocks/Bonds/Mutual Funds)	Location of Certificates/Statements	Contact Information

### IRAs

Name of Financial Institution	Account #	Location of Statements	Contact Information

### 401(k)s

Name of Financial Institution	Account #	Location of Statements	Contact Information

### Annuities

Name of Financial Institution	Account #	Location of Statements	Contact Information

### Employer Benefits

Name of Employer	Benefit (Pension/Savings/Group Insurance)	Location of Statements	Contact Information

"He that won't be counseled can't be helped."  
-Benjamin Franklin



## Assets (Continued)

### Real Estate Papers

	Address	Location of Deeds/Records
Primary Residence		
Secondary Residence		
Investment Property		

### Autos

Description of Vehicle	Location of Title/Registration/Finance Agreement

### Mortgages Held or Notes Receivable

Name of Debtor	Address of Debtor and Amount Due	Location of Documents	Contact Information

### Business Interests Owned

Name of Business	Address	Location of Documents	Contact Information

## Insurance Coverage

### Life Insurance

Name of Policy and Type	Account #	Location of Contracts	Contact Information

### Disability Insurance

Name of Policy and Type	Account #	Location of Contracts	Contact Information

"Wise men don't need advice. Fools won't take it."  
-Benjamin Franklin



## Insurance Coverage (Continued)

### Long-Term Care Insurance

Name of Policy and Type	Account #	Location of Contracts	Contact Information

### Health Insurance

Name of Policy and Type	Account #	Location of Contracts	Contact Information

## Debt

### Credit Cards

Name of Issuer	Account #	Address	Contact Information

### Loans

Name of Lender	Account #	Address	Type of Account (Loan/Lease)	Contact Information

### Mortgage Loans

Name of Lender	Account #	Address of Property	Contact Information

## Other

### Safe Deposit Box

Name of Bank	Box #	Contents of Box	Location of Key

### Safe

Personal Safe		Combination #	Location of Safe
<input type="checkbox"/> Yes	<input type="checkbox"/> No		

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"Lost time is never found again, you may delay,  
but time will not."

-Benjamin Franklin



## Other (Continued)

### My Computer

Many Documents of Mine Can Be Found on My Computer		Login ID	Login Password
<input type="checkbox"/> Yes	<input type="checkbox"/> No		
My Internet Account is with:			Account Number:
My Email Address is:			

### My Home

Security System		Passcode to Set/Disarm the System
<input type="checkbox"/> Yes	<input type="checkbox"/> No	

## Final Arrangements

### Funeral

Funeral Home:		Address:	
Cemetery:		Address:	
Burial Plot:		I wish to be buried next to:	
Officiant to perform service:			
Pre-Paid Burial Program		Company	Amount
<input type="checkbox"/> Yes	<input type="checkbox"/> No		
Contact:			
Wish to be Cremated		Crematory	Special Requests
<input type="checkbox"/> Yes	<input type="checkbox"/> No		
Tombstone Engraving:			
In lieu of flowers, please ask for donations to:			

*"If you have something to do tomorrow, do it today."*

-Benjamin Franklin

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