

# Family Organization Checklist

## *Planning for the Unexpected – Warren M. Bergstein, CPA, AEP*

When the unexpected happens, families often struggle not because they lack documents — but because everything is scattered, outdated, or unclear.

Use this checklist to identify the **most critical items** your loved ones would need.

### 1. Emergency Contacts

- Accountant, attorney, and financial advisor
- Healthcare proxy / Power of Attorney
- Trusted person who knows where everything is located

### 2. Core Documents & Locations

- Will / Trust
- Powers of Attorney (financial + healthcare)
- Life insurance policies
- Deeds, titles, and recent tax returns
- Safe deposit box location

### 3. Financial Accounts

- Bank and investment accounts (last 4 digits)
- Retirement accounts (IRA, 401k, etc.)
- Life insurance policy numbers

### 4. Digital & Access Info

- Primary email
- Password manager or secure access instructions
- Recurring bills and payment details

### 5. Personal Wishes

- Funeral or memorial preferences
- Any specific instructions for family or pets

This checklist is a helpful **starting point** — but every family's situation is unique. Taxes, blended families, business interests, beneficiary designations, and state laws add layers of complexity.

Many people discover that organizing the information is only part of the challenge. Making sure everything is properly aligned, up-to-date, and truly usable by your family is where experience matters most.

I'd be happy to review your current setup with no pressure or obligation.



Life changes. Are you ready?

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