



New York Life LifeFolio Checklist

The Company You Keep®

Organizing our lives has become a popular theme. From the way we organize our closets, to how we manage our workflow at the office, to how we maintain and record the many important details of our lives.

However, if hard pressed, most people will have a difficult time locating their critical documents when a major life event occurs. That is why we have created the New York Life LifeFolio Checklist.

Your Name: _____

Your Address: _____

If you have any questions, or need help filling out your LifeFolio Checklist, please call your New York Life agent:

Name: _____

Phone Number: _____

Date: / / Last updated / /

Whether you are changing jobs, buying a home, caring for an aging loved one, experiencing a death in the family, or planning your retirement, events can send you into a document search tailspin.

Just think about how many documents the bank requests when you apply for your home mortgage or the litany of current and historical documents that are needed to settle an estate when someone has died.

Because we don't tend to deliberately sit down and document everything we have or might need to prepare for such events, unexpected circumstances send most of us scurrying to collect what is required. Until now.

The New York Life LifeFolio Checklist will help you and your family organize the key aspects of your life in an easy-to-complete way that you can share with those close to you, as well as your investment professional, attorney, accountant and your executor/executrix.

Completing the LifeFolio Checklist may be one of the easiest, but most important gifts you can give yourself and your family. We suggest you store your important documents in a safe place, preferably in a locked, fireproof filing cabinet, safety deposit box¹ or safe. But remember to share access with a trusted friend or family member.



Key Contacts		Office Phone	Cell Phone
	New York Life Insurance Agent Name:		
	CPA/Accountant Name:		
	Attorney Name:		
General Items		Location	
The following general documents should always be readily available.			
	Adoption Papers		
	Birth Certificate		
	Driver's License Number and Expiration Date		
	Marriage/Domestic Partnership/Civil Union Certificate		
	Passport/Citizenship (Naturalization) Papers		
	Pre-nuptial Agreement		
	Safe and Combination		
	Safe deposit box(es) and keys		
	Separation or Divorce Papers		
	Social Security Card		
Emergency Papers and Information		Location	
The items below may be needed when someone becomes seriously ill.			
	Living Will/Health Care Proxy		
	Durable Power of Attorney ²		
	Financial Institution's Proprietary Power of Attorney ³		
	Beneficiary Forms for IRAs, 401(k)s, or other Benefits Plans		
The items below may be needed soon after someone dies.			
	Cemetery Plot Deed		
	Charitable Donation Preference(s)		
	Burial Instructions		
	Death Certificate ⁴		
	Funeral Home Preference & Information		
	Information for Obituaries (Resume)		
	Last Will and Testament ¹		
	Letter of Instruction (if available) from deceased to his/her executor/executrix		
	Military Discharge Papers ⁵		
	Phone Number/Address of County Surrogate Court ⁶		
	Pre-paid Cremation Documents		

Life Insurance, Annuities & Other Insurance Policies		Office Phone	Cell Phone
Life Insurance policies as well as any variable or fixed annuity documents needed to settle claims.			
	Group Life Policies		
	Health and Accident Insurance ID Cards & Claim Records		
	Life Insurance Policy Documents		
	Mortgage Insurance Policy		
	Travel Insurance Policy		
	Variable Annuity or Fixed Annuity Statements/Documents		
	Beneficiary Forms for Insurance and/or Annuity Policies		
	Long-Term Care Insurance Policy		
	Property and Casualty Policy Documents		
	Veterans Administration Insurance Papers		
Financial, Bank & Credit Documents		Location	
Documents needed to settle outstanding credit accounts and debts, free up necessary cash to settle the affairs of an estate and transfer ownership per Last Will and Testament.			
	Appraisal or Inventory of Valuable Items		
	Buy/Sell or Partnership Agreements		
	Certificates of Deposit (CDs)		
	Checks and Checking or Money Market Account Statements		
	Credit Cards and Account Statements		
	Credit Union Account Books or Statements		
	Deferred Compensation Agreement Documents		
	Federal/State Gift-tax Returns		
	Lawsuit or Documents on Pending Legal Actions		
	Loans Outstanding (Money Owed)		
	Medical Bills, Prescription Plan Card/Records		
	Mortgage Documents		
	Motor Vehicle Title Papers		
	Passbook Savings Accounts		
	Prior Years' Tax Returns		
	Promissory Notes (Debts Owed)		
	Property and School Tax Records		
	Real Estate Deeds, Other Titles of Ownership		
	Rental and/or Lease Agreements		
	Trust Documents/Agreements		
Investment Documents		Location	
Documents needed for the transfer of ownership per Last Will and Testament and credit applications.			
	Alternative Investment Documents (including K-1s)		
	Bearer Bonds Not Held in an Account		

Investment Documents (Cont.)	Location
Beneficiary Forms for IRAs, 401(k)s, or Other Benefit Plans	
Company Retirement Plan Statements from all Employers	
Documents Showing Cost Basis of Securities Owned or Sold	
Individual Retirement Plan Statements	
Investment Club Documents/Records	
Mutual Fund Account Statements	
Online Securities Transaction Information	
Other Company Benefits (e.g. Deferred Compensation)	
Stock Certificates Not Held in an Account	
529 College Savings Plan Statements	

When To Contact Your New York Life Agent

As you move through the various stages of your life, remember that you have a valuable resource — your New York Life agent.

He or she is highly-trained and available to review your insurance and financial needs and recommend adjustments as your circumstances change. In addition to scheduling regular financial check-ups, your New York Life agent should be contacted in the event of:

- An engagement or marriage
- The birth/adoption of a child or grandchild
- The purchase of a new home
- A change or loss of job
- Separation or divorce
- The death of a close family member
- Sudden illness or tragic loss of a loved one
- Sudden financial inheritance or windfall

As you seek financial security for yourself and your loved ones, you want the best. New York Life agents, widely recognized as the best-trained professionals in the industry, can help you determine your personal financial objectives and how to achieve them.

Contact your New York Life agent today and find out why we are *The Company You Keep*[®].

¹ Wills should never be stored in a safe deposit box. Instead, Wills should be kept in either a lawyer's Will safe or fireproof safe at home.

² The right of survivorship — assets held in this manner are not subject to probate (unless both parties are deceased); instead, the survivor simply provides evidence of death to the appropriate financial institutions so that the title can be changed.

³ Some financial institutions may refuse to accept a standard Power of Attorney.

⁴ The executor/executrix should obtain a sufficient number of death certificates for transferring ownership of accounts, titles, etc.

⁵ Veterans receive a small stipend toward burial expenses.

⁶ Note: The county court or clerk's office where the decedent resided handles the estate matters and will probate the Last Will and Testament.

The preceding information has been provided for informational purposes only. New York Life does not provide legal, tax or accounting advice. Please contact your own advisors.

