

§1-A (1): Read Me First

General Recommendations for Completing My “Everything” File®

These are some random reminders of things to do to make things easier for your survivors and representatives to find whatever is needed to take care of you and to locate all the things they will need to know.

<p>My “Everything” File® was designed for one person to complete.</p>	<ol style="list-style-type: none">1. If you are married, both of you should complete your own My “Everything” File®. While some information will be identical for both of you, such as children or joint assets, most information will not. Therefore, you may want to consider purchasing a second thumb drive version of it at www.MyEverythingFile.com.2. If you know how to copy and save the entire digital file on the thumb drive, you may do so, but be sure to save it with the second person’s name.
<p>Pages to print-out first to help you complete your “Everything” File:</p>	<ol style="list-style-type: none">1. Section 0-B - Table of contents - to help you get an overview of the organization of the 90+ subsections.2. Section 1-B – Follow-up checklists - to help you jot down information, supplies, and equipment you discover that you need to complete your “Everything” file.
<p>Before you start:</p>	<ol style="list-style-type: none">1. Don’t let the overwhelming amount of information asked deter you from getting started. It has taken you a lifetime to accumulate this information.2. You don’t have to complete everything! Most of the sections won’t necessarily apply to you. Just identify the sections which apply to you, and work on them, one at a time.3. And you don’t have to answer every question in each section. Just identifying the basics (e.g. a bank account and account number) may suffice. But the more information you provide will save your loved ones the time and hassle of tracking-down any information you have omitted.4. At some point, try to answer every “Yes” or “No” question. A “No” answer will save them the worry as to whether they missed something. (e.g. If you answer “No” to the question as to whether you have a safe deposit box will save them the worry in wondering if you have one.)
<p>While completing each section of My “Everything” File®:</p>	<ol style="list-style-type: none">1. Be sure to continue scrolling to the bottom of each section. Due to formatting, it was sometimes easier to leave a blank section and start a new subsection on the next page.2. If you don’t have enough templates for any particular category than provided here, just copy a blank one and save it as another name (be careful not to overwrite a file you have already completed. (e.g. if you have more than 3 children, just copy one of the files and save it with a new name (e.g. “Section 5-C3 Information about Child #4”)3. Feel free to change the names of the files to meet your own needs. After all, this is your “Everything” file!

SECTION 1: INTRODUCTION

<p>There is a “storage vault” corresponding to each section of My “Everything” File®:</p>	<ol style="list-style-type: none"> 1. There is sufficient space in the thumb drive to store thousands of documents. 2. Use this as an opportunity to organize all of the paperwork for which you don’t need the original documents. Just scan and upload them to the “storage vault” corresponding to each section, and then shred the originals.
<p>Consider uploading copies of the following documents and to My “Everything” File®: (There is sufficient space in the thumb drive to store thousands of documents)</p>	<ol style="list-style-type: none"> 1. End-of-year financial statements (update at end of every year) 2. Life & other insurance policies 3. Pre-planned or pre-paid funeral policies 4. Copy of deeds to real estate and title to vehicles 5. Other documents you know your loved ones will need. Indicate where the original documents can be found
<p>Make a checklist of important recurring dates:</p>	<p>Include personal info, such as birthdates, income tax filing deadlines, required distribution (RMD) dates from IRAs, annual physical check-ups, Medicare filing dates, etc. Be sure to include an annual date to review how all your assets are titled and any beneficiary designations. Consider doing this right after filing your income tax return, so all your account details are already available to you.</p>

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§1-A (2): General Recommendations to Make Things Easier for Your Survivors

These are some random reminders of things to do to make things easier for your survivors and representatives to find whatever is needed to take care of you and to locate all the things they will need to know.

Have an emergency grab-and-run kit:	Prepare a grab-and-run kit containing your “MUST HAVE” information and documents to take with you in case there is a fire or other emergency requiring you to flee from your home. If one could take just one thing with them from their house in an emergency, many people would want their family picture albums, so consider including a flash drive containing all your favorite digital pictures.
Beneficiary and contingent beneficiary designations:	Consider having a beneficiary designated on all financial assets, as well as a contingent beneficiary designation. Review them every year or two.
Make a home video of everything in your house (don’t forget your basement, attic, storage locker, garage, and office or business):	Narrate it as you film, describing the item(s) you see, and sharing any details of importance about them. Update it every few years, and store it away from your home, so you won’t lose the contents in case of a fire. Keep it safe for insurance purposes, too.
Update frequently:	Monitor your emails, credit card statements, bank statements, and incoming correspondence to keep track of what comes to you in paper format versus digital format in emails or over the internet. In addition, keep track of any account or bills that are automatically renewed, paid, and/or charged to your checking account or credit card, so your representative will know to turn off the auto-pay function.
For spare keys to everything:	Consider adding an envelope or key slot organizer so there is a single place where a second set of keys can be located (house, investment properties, storage locker, shed, vehicles, safe deposit box, etc.)
After you have prepared your estate planning documents:	Tell your loved ones not only whether you have prepared estate-planning documents, but if so, where the originals are located!
After you have finished filling out this copy of My “Everything” File®	The same applies to your completed My “Everything” File® ! Why go through all that effort if they can’t find it? Literally, show them where it is located!

Additional Notes:

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§1-B: Your Follow-Up and To-Do List for Preparation of your “Everything” File®

While working your way through My “Everything” File®, you may find you don’t have all the information, documents, or equipment you need to complete it. So, here is a place for you to list the information, supplies, and equipment you discovered that you need to complete this document.

Information I need to obtain (and from whom):	Completed?
1. _____	<input type="checkbox"/>
2. _____	<input type="checkbox"/>
3. _____	<input type="checkbox"/>
4. _____	<input type="checkbox"/>
5. _____	<input type="checkbox"/>
6. _____	<input type="checkbox"/>
7. _____	<input type="checkbox"/>
8. _____	<input type="checkbox"/>
9. _____	<input type="checkbox"/>
10. _____	<input type="checkbox"/>
11. _____	<input type="checkbox"/>
12. _____	<input type="checkbox"/>
13. _____	<input type="checkbox"/>
14. _____	<input type="checkbox"/>
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17. _____	<input type="checkbox"/>
18. _____	<input type="checkbox"/>
19. _____	<input type="checkbox"/>
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26. _____	<input type="checkbox"/>
27. _____	<input type="checkbox"/>
28. _____	<input type="checkbox"/>
29. _____	<input type="checkbox"/>
30. _____	<input type="checkbox"/>
31. _____	<input type="checkbox"/>
32. _____	<input type="checkbox"/>

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People I need to contact (and what information is needed from them):

Completed?

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Documents I need to locate:

Completed?

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Equipment and supplies I need to purchase:

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SECTION 1: INTRODUCTION

Miscellaneous other things I need to do:

Completed?

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SECTION 1: INTRODUCTION

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