## money THE LEGACY DRAWER CHECKLIST

So what is it? Basically, it's a drawer that houses all of the important information your family needs in case something happens to you. Preparing for when you are no longer here is not a fun task, but it's crucial to do this for your family.

Every household needs a Legacy Drawer. It doesn't matter if you're single with no kids or 76 and have 12 grandkids—you need a Legacy Drawer. It's the last gift you will give your family, so make it a good one. If you truly care about your loved ones, you will take the time to create a Legacy Drawer.

The drawer should be somewhere in your home and contain everything your spouse or family needs to know if you aren't around—anything that has to do with your financial life should be in that drawer. You must organize it in a way that anyone can find a specific document in 30 seconds. All files should be clearly marked, in order, and easy for a grieving family member to find. There's no need to go into extreme detail when creating your Legacy Drawer. Simply include the appropriate documents in an easy-to-understand format, and you're good to go!

Decide on a location
Make sure you start with a cover letter. This letter will simply give the reason and purpose of the drawer.
Will and Estate Plans
Insurance Policies.
Financial Accounts.
Legal Documents. SIN, Birth Cert, Passport
Passwords. User name, PINs
Safe Deposit Box
Monthly Budget.
Tax Returns. Keep a copy of 2-3 years
Funeral Instructions
Letters to loved ones