



Planning for the Unexpected

- A guide for discussion
- A document that contains important information

O'BRIEN WEALTH PARTNERS

Our comprehensive wealth management approach enables us to provide advice on all financial touch points including investment, insurance, retirement, estate, tax, and business succession planning. We are committed to a culture of inclusiveness, empowerment, and positivity.

Have I talked with my family about how I want to be cared for during an illness or at the end of my life? Do I know how they want to be cared for?

Talking about illness, disability and death is extremely difficult. However, making sure that your family and friends know your wishes beforehand can help you—and them—care for you and your loved ones in the way you want.

This document will help you share the answers to the following questions:

- *How do I want to be cared for if I am ill?*
- *If I become ill or if I die, what will my family or friends need to know about my financial and personal situation?*
- *How do I want to be remembered?*

It also provides a framework for recording important information that your family will need to know.

» Key Questions

Have I talked with my family about how I want to be cared for during an illness or at the end of my life? Do I know how they want to be cared for?

How do I want to be cared for if I am ill?

- Who should know that I am ill?
- Who should be permitted to visit me?
- Who should make health care decisions for me when I am not able to do so? (Who is my health care proxy?)
- What kinds of care do I want? Not want?



» Key Questions, continued

If I become ill or if I die, what will my family or friends need to know about my financial and personal situation?

- Who is going to take care of my children? My pets?
- Who will pay my bills and take care of my home?
- Where are my records and documents kept?
- Who are my advisors? How would you find them?
- Who should my caretakers go to for help or advice?



» Key Questions, continued

How do I want to be remembered?

- Do I want a funeral?
- What should be done with my body?
- Who will inherit my assets and possessions?

What else do my caretakers need to know?



» General Information About Me

My Name: _____

My Birth Date: _____

My Social Security Number: _____

My Emergency Contact(s):

	Name	Phone number	Email address
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____

My Doctors:

	Name	Type	Phone Number
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____



» My Advisors

	Name	Phone	Email
Financial Advisor			
> 1	_____	_____	_____
> 2	_____	_____	_____
Accountant			
> 1	_____	_____	_____
> 2	_____	_____	_____
Estate Attorney			
> 1	_____	_____	_____
> 2	_____	_____	_____
Insurance Broker			
> 1	_____	_____	_____
> 2	_____	_____	_____
Other			
> 1	_____	_____	_____
> 2	_____	_____	_____

» Where My Records Are Kept

Personal Documents (Social Security, Birth and Marriage certificates):

Estate Planning Documents (Will, Trusts, Durable Power of Attorney, Health Care Proxy, Living Will):

Financial Statements:

	Account Name	Number	Location/Website
1	_____	_____	_____
2	_____	_____	_____
3	_____	_____	_____
4	_____	_____	_____
5	_____	_____	_____
6	_____	_____	_____

Location of Safe Deposit Box and Key:

Other:



» Other Information

Health Insurance Policy (Insurer and Policy Numbers):

Passwords for Online accounts:

Funeral and burial arrangements:

Guardians for my children:

Other Information/Wishes:

