



guiding your way through retirement
300 Morrison Park Drive, Suite 130, Southlake, TX 76092

www.KPCFinancialSolutions.com

877- KPC-PLAN

H.U.G. FILE

Helping You Grieve

Preplanned Funeral Arrangement

- Funeral home phone number & contact person
- Prepaid contract information
- Wishes for service

Life Insurances

- Servicing company name and phone number
- Copy of Policy with Death Benefit Value and Surrender Value

Will and Testament

- Note location of the original will document
- Name of the executor of the will

Trust

- Note location of the original trust document
- Name of the trustee or successor trustee
- What assets are held in the trust

Bank account information

- Bank name and address
- Account numbers

Safe Deposit Boxes

- Bank name and address
- Box number
- Location of key for box
- List of contents of the box

Financial Information

- Name and phone number of financial advisor
- Investment account company name and account numbers
- Social Security Statements of annual estimate of benefits or actual benefit receiving from Social Security
- Insurance Policies such as Auto, Home, Disability, Health, etc.

Accounting Information

- Accounting System/Check books with basic instructions i.e. banking downloads, tax reports, etc. and name of accountant
- Tax Return location for previous years and who usually prepares the taxes

Usernames & Passwords

Create a list or spreadsheet for critical account that you access online such as Email, Banks/Credit Cards, Investments, Insurance, Utilities, and Airlines/Travel

Personal Items

Specify who you want to receive items not detailed in will such as Jewelry, Photos, and Collectibles

Personal Messages

“Who you are to me” letter to loved ones