

Maloon Powers Pitre & Higgins LLC

CALIFORNIA FINANCIAL ADVISORS

The Everything List

In an effort to have my estate as organized as possible for you upon illness or my passing, here is a list of important documents to find and people to reach out to:

Name:

Date:

Location

The Everything Binder Book

The Everything Binder Book has been designed to help keep all my personal information safe and organized in one place--primary contacts, medical history, insurance information, private access information, estate planning, retirement details, final wishes, letters to loved ones and much more.

Location

Estate Plan

Name:

Estate Planning Attorney

Phone #:

Email:

Name:

Tax Accountant

Phone #:

Email:

Name:

Financial Advisor

Phone #:

Email:

Additional Special Instructions:

Confidential

2303 Camino Ramon, Suite 250, San Ramon, CA 94583

Main: (925)-275-1000 Toll Free: (800)-841-3823 Fax: (925)-275-9109

www.calfinad.com Maloon, Powers, Pitre, and Higgins, LLC is a Registered Investment Advisor