Legacy Document Checklist

ABOUT THIS DOCUMENT: This document provides a checklist for important documents you should have prepared for Legacy Planning purposes. We recommend storing the originals or copies of each document in your LifeFolio and keeping a digital backup in your LifeExec account in the even the originals are lost or destroyed.

Documents to Include in LifeFolio

- [ ] Trust
- [ ] Power of Attorney
- [ ] Last Will and Testament
- [ ] Advanced Directive
- [ ] Life Insurance Policies
- [ ] Final Expense Policies
- [ ] Burial/Funeral Insurance Policies