# I've Died. Now What?

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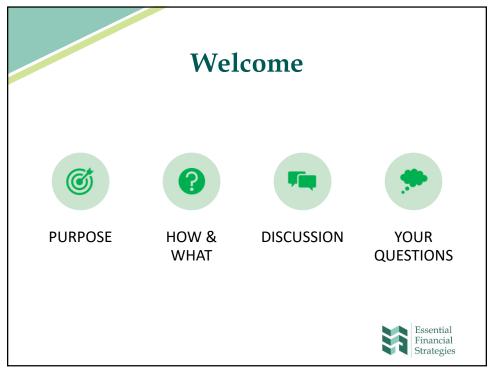


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# The not so fine, fine print disclaimer

- Rorik is not an Attorney
- For Educational Purposes





# Consequences

- Misinterpreted Wishes
- Chaos-financial and legal
- Not know what was wanted
- Tearing apart survivors
- Focus on turmoil not grief and memories
- Missing key planning opportunities
- Acceptance and Empowerment of Advocates
- Pet Care

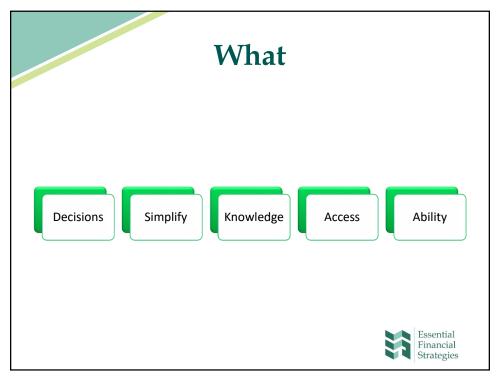


## **Proactive**

- Decisions, Discussions, and Documents
- Review and Update
- Communicate



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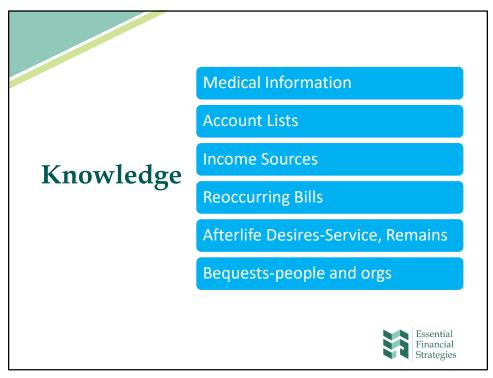
### **Decisions**

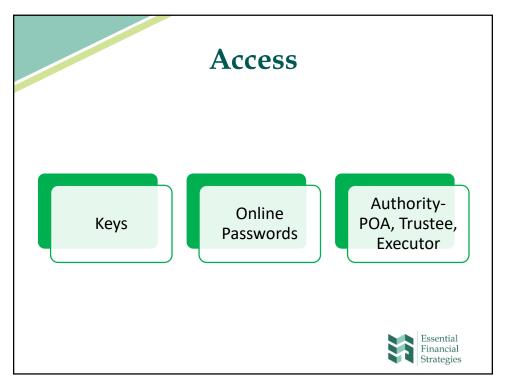
- At what point will you stop driving? Sell the car?
- When will there need to be someone designated to help with finances and healthcare decisions?
- Who: A family member or another person
- Do you plan on aging in place or moving before eminent healthcare is needed?
- How will you know changes are necessary?

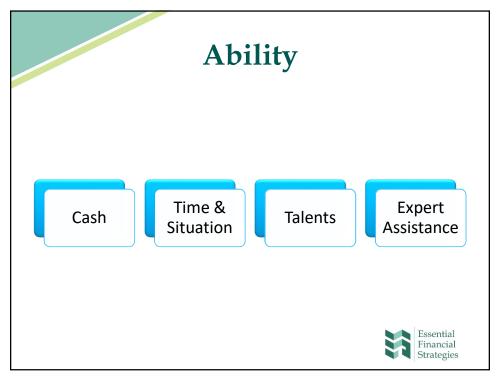


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# Reduce number of institutions Banking, Investment, Charities Tax Payments in Retirement Automatic Payments-Bills, Donations Reduce clutter or unneeded items







### **Documents**

- Where?
  - Safe Deposit Box
  - Fire Box
  - Online
- Who has copies?
- Wills
- Trusts
- Power of Attorneys (POAs)
- Birth and Marriage Certificates
- Spousal Death Certificate
- Passports
- Bank Records
- Credit Cards
- Utility Bills
- Vehicle Titles & Registrations
- Tax Returns & Records
- Mortgages and Deeds
- Insurance
- Paper Bonds and Stocks
- Veteran DD 214
- Divorce Decrees





Essential Financial Strategies	al VVORK Prioritzation Matrix					
Write in Date Due for each selection						
	Already have	CRITICAL Choose top THREE (3) to be done in First Week	IMPORTANT Choose FIVE (5) things to be done within 1 month	NECESSARY Choose FIVE (5) things to be done within 3 months	USEFUL Choose FIVE (5) things to be done within 6 months,	Completed
□ will						
☐ Advance Directive (DNR, Living Will, Health Proxy)						
☐ Power of Attorney						
☐ List of Medications/Primary Care Physician/ Health Insurance Information						
☐ Dementia Protocol						
☐ Funeral Arrangements						
☐ Safe Deposit Box						
☐ List of Passwords						
☐ Trust Agreements						
☐ Insurance Review						
☐ Household/ Personal Acct information						
☐ Legacy Information						
☐ Create Master List						
☐ List of assets/debts						

### **Test Runs**

- By Yourself?
- House Access, Home Alarm
- Safe Deposit Box
- Fire Box
- Contact Brokerages
- Retirement Accounts
- Insurance Agencies
- Utilities
- Social Media
- Pets
- Worst Case Scenario



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### Workbook



