

# I've Died. Now What?

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## The not so fine, fine print disclaimer

- Rorik is not an Attorney
- For Educational Purposes



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# Welcome



PURPOSE



HOW &  
WHAT



DISCUSSION



YOUR  
QUESTIONS



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# 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



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## Proactive

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



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## What

Decisions

Simplify

Knowledge

Access

Ability



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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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## Simplify



Reduce number of institutions    Banking, Investment, Charities



Tax Payments in Retirement



Automatic Payments-Bills, Donations



Reduce clutter or unneeded items



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## Knowledge

Medical Information

Account Lists

Income Sources

Reoccurring Bills

Afterlife Desires-Service, Remains

Bequests-people and orgs



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## Access

Keys

Online  
Passwords

Authority-  
POA, Trustee,  
Executor



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# Ability

Cash

Time &  
Situation

Talents

Expert  
Assistance



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# 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



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# What to Do First, Now



Tackle one thing at a time.



Do the hardest or easiest first?



Share workload with partner



Store where accessible: paper and online



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## Work Prioritization 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
<input type="checkbox"/> Will						
<input type="checkbox"/> Advance Directive (DNR, Living Will, Health Proxy)						
<input type="checkbox"/> Power of Attorney						
<input type="checkbox"/> List of Medications/Primary Care Physician/ Health Insurance Information						
<input type="checkbox"/> Dementia Protocol						
<input type="checkbox"/> Funeral Arrangements						
<input type="checkbox"/> Safe Deposit Box						
<input type="checkbox"/> List of Passwords						
<input type="checkbox"/> Trust Agreements						
<input type="checkbox"/> Insurance Review						
<input type="checkbox"/> Household/ Personal Acct information						
<input type="checkbox"/> Legacy Information						
<input type="checkbox"/> Create Master List						
<input type="checkbox"/> List of assets/debts						

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## 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



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# Discussion & Final Questions

