



THE Legacy DRAWER

A legacy drawer is a drawer where you keep all your important end-of-life documents. These documents will tell your family what to do if something happens to you. You should include:

A **cover letter** that describes what's in the drawer and how to use each document

Your **will and estate plans**, plus names of your executor and powers of attorney

A list of your **insurance policies** (health, life, auto, disability, etc.), policy numbers, names of policy holders and beneficiaries, and your agent's contact info

The names, numbers, passwords and balances of all your **financial accounts**, like your checking account or 401(k)

A copy of your **monthly budget**—including expenses, automated payments and bill payment accounts

Personal and business tax returns in case of an IRS audit after you die (it's crazy, but it can happen!)

Important documents like deeds and titles to things you own, marriage and birth certificates, and Social Security cards

Passwords, usernames, security questions and PINs for **online and social accounts**

Burial and service instructions for the type and location of your burial, songs or speeches for the service, and any other specifics you want

Legacy letters telling your family how much you love them, what you hope for their futures and anything else you want them to know

In a separate place—*not* your legacy drawer—give **instructions to access the safe deposit box** where you'll store copies of all these documents in case your legacy drawer gets destroyed.