

# **THE LOVE BOOK**

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**Your family will love you even more  
for preparing this book**

**MEL presentation  
July 6, 2012**

# **THE LOVE BOOK**

- **WHAT IS IT?**
- **WHO GETS IT?**
- **WHAT DOES IT LOOK LIKE?**
- **WHAT DO I PUT IN THE BOOK?**

## ❖ *Table of Contents*

### ❖ *List of Contacts:*

- **Attorney**
- **Accountant**
- **Insurance agent – Life and Casualty**
- **Brokers, Investment Advisors**

## ❖ *Will and Trusts*

- **Where are they?**
- **Names of executor, trustees, successors**
- **Beneficiaries**
- **Powers of Attorney – health, property**

## ❖ ***List of Assets – Personal balance sheet***

- **401(k), IRA, Social Security information**
- **Description of tangible and intangible assets**
- **Contact person**
- **Evidence of ownership – titles, stock certificates, bonds**

## ❖ ***Bank Accounts – Checking and Savings***

- **Names of banks**
- **Account numbers**
- **Names of signators**
- **Location of check books**
- **Any automatic withdrawals from bank account?**

## ❖ ***Liabilities***

- **Bills that must be paid regularly – rent, mortgage, real estate taxes**

## ❖ ***Safe Deposit Box***

- **Name of bank – location of key**
- **Box number**
- **Who can sign?**
- **Description of contents**



## ❖ *Insurance-Life, casualty - home and auto*

- **Description**
- **Broker**
- **Premium requirements**
- **Location of policies**

## ❖ *Description of tangible and intangible assets*

- **Contact person**
- **Evidence of ownership – titles, stock certificates, bonds**

## ❖ *Automobile*

- **VIN**
- **Service history**

## ❖ *Credit Cards*

- **Description**
- **Automatic charges to credit card?**
- **ATM, Club Memberships**

## ❖ *House information*

- **List of service suppliers-plumber, electrician, lawn care**
- **List of utility companies**
- **Major improvements**

❖ ***Information concerning second home***

❖ ***Other valuables***

- **Collections**
- **Location**
- **Estimated value**
- **Art and Jewelry**

## ❖ ***Income taxes***

- **Location of prior returns**
- **Location of current information – 990s, K-1s,**
- **Charitable contributions and other deductible expenses**

## ❖ ***Medical information***

- **Medical insurance – Medicare, private**
- **List of doctors-history of visits**
- **Medications**

## ❖ *Home Office*

- Description of Files

## ❖ *Passwords*

## ❖ Letters to Family

# **Ancillary Benefits of Love Book**

- **If you are an executor or have to handle the affairs of another, ask them for this information.**
- **Book is repository of information for you.**



***THE END***

***QUESTIONS?***