Leave a Map, Not a Mess

BROWN WEALTH MANAGEMENT

When people die, it can be challenging for their heirs to locate all of their financial assets. Instead of leaving behind a mess, Brown Wealth Management clients can leave a map! Use this worksheet to help those who may eventually be involved settling your affairs.

This is not a legal document or a substitute for professional legal advice–an estate plan created by a qualified attorney with regular updates is essential. We recommend updating it each year and keeping it in a secure location, such as your electronic vault on the Brown Wealth Management EMX website, along with a list of complete recent statements for your various accounts. Instruct your trusted contacts to reach out to Brown Wealth Management in the event of your incapacitation or death.

Learn how to upload files to your electronic vault with Brown Wealth Management here.

Important Documents: consider keeping copies of the following with this form

☐ Location of Tax Returns:	enter location here
☐ Location of Original Birth Certificate:	enter location here
☐ Location of Original Marriage License:	enter location here
☐ Location of Estate Plan (Trust, Will, etc.):	enter location here
☐ Location of Military Records:	enter location here
☐ Location of Social Security Card:	enter location here
☐ Location of Judgments from Court Cases:	enter location here
☐ Location of Medical Records:	enter location here
☐ Location of Titles to Home/Real Estate/Vehicles:	enter location here
☐ Location of Mortgage or Loan Statements:	enter location here
☐ Location of Utility Statements:	enter location here
☐ Location of Other Important Documents:	enter location here

Personal Property

☐ Location of Safe Deposit Box or Personal Safe:	enter location here
☐ Location of Key(s):	enter location here
☐ Location of Someone Else's Property in My Possession:	enter location here
☐ Property Identifiable as:	enter location here
☐ Location:	enter location here

Pet and Home Care Instructions

☐ Pet Information and Care Instructions:

☐ Home Care Instructions:

Digital Assets

- [ ] Apps with Value (Venmo, PayPal, etc.):
- [ ] Rewards Points (credit cards, airline miles, etc.):
- [ ] Social Media (usernames, password locations):
- [ ] Email (email addresses, password locations):
- [ ] Devices (location, important files, password locations):

Important Contact Information: List Names, Relationships, Phone Numbers, Email Addresses, Address and Any Special Instructions

Relative/Friend Name Here	Enter Relationship Here	Enter Contact Information and Notes Here
Relative/Friend Name Here	Enter Relationship Here	Ener Contact Information and Notes Here
Relative/Friend Name Here	Enter Relationship Here	Ener Contact Information and Notes Here

Successor Trustee(s):	Enter Contact Information and Notes Here
Guardian(s):	Enter Contact Information and Notes Here
Personal Representative(s):	Enter Contact Information and Notes Here
Financial Advisors:	Jeff Brown: jbrown@brownwealthmgt.com 858 926-5150 Patrick Ford: pford@brownwealthmgt.com 858 926-5146
Attorney(s):	Enter Contact Information and Notes Here
Doctor(s):	Enter Contact Information and Notes Here
Tax Advisor(s):	Enter Contact Information and Notes Here
Insurance Agent(s):	Enter Contact Information and Notes Here
Spiritual Advisor(s):	Enter Contact Information and Notes Here

Ethical Will: An Ethical Will is a non-legal document that supplements an estate plan. It's a way to put your financial/life lessons, values, and wishes on paper for your heirs. This can offer a window into your thinking and help resolve family conflicts and inform beneficiaries of your wishes for use of funds, etc. Ethical Wills take on many forms. A quick "Google" search will yield many examples. Use the space below to write your Ethical Will.