

# Legal Matters: Essential information for the loved ones of the deceased

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**Q:** How Can I Make My Passing Easier on My Family?

**A:** We all know that having a Will that provides clear instructions and is up-to-date will greatly assist your family after your passing. However, in addition to having a Will, it is also very helpful to prepare a list of your assets and the names and phone numbers of the people who handle your financial, legal, tax and business affairs.

You should update this list at least once a year and include information about all your bank accounts, investments, business interests, real estate properties, safety deposit boxes and keys. Include the names and numbers of your accountant, lawyer, pastor, financial adviser and insurance broker. If you have pre-planned your funeral, include this information as well. Include information on your current income sources and benefits such as your pension and life insurance information. Record passwords and any other information you feel is necessary to assist your family.

Make sure your estate trustees and family know where this material and your original Will are located. Taking the time to compile this information now can save your heirs and executors hours of work and frustration and can also prevent assets from being lost or overlooked in the final settlement of your affairs.

Your friends at Shank Law.