



## PREPARING THE "GO TO FOLDER"

***CONGRATULATIONS! On your decision to be proactive and organized! This Go-To Folder is a valuable gift that you can leave in case you become unable to speak for yourself or for when you pass away. Tell your loved ones to "GO TO" this folder if something happens to you for guidance and direction.***



Note from Jill:

I have been working with families for over 30 years helping maneuver through care options, planning for long term care and planning for end of life. It has been my privilege to do so but honestly, many times I have thought to myself how difficult the individual made it on their family by NOT planning ahead. I know that talking about death, planning for a situation where you can not speak for yourself is hard and emotional. But let's face it, making decisions now, that reflect YOUR choice, will make it easier for your loved ones but also reassure you now that your wishes are to be followed.

I created the GO TO folder, as a tribute to my dad. He has had the "Blue Binder" on his desk for years. He has said to me many times, "that is the book I want you to "go to" when I die... it has everything you need it in." What a gift to my sister and me. He has organized and planned and offered us guidance. My dad has always been a planner, so this is not unique for him, but I know there are many out there that are not quite a prepared. I hope that this tool, will help you organize and find the necessary documents you need to have in case something happens to you, that it empowers you with the knowledge that your voice matters and your wishes matter. I encourage you to begin to fill this binder with your information - it will be an amazing gift to those who love you!

With Gratitude and Of service,  
Jill A Pulliam, CEO  
Benefit Results, LLC

*Important to note that this folder is not intended to be legal advice only a place to store and organize your documents!*



## PREPARING THE "GO TO FOLDER"

Create a binder with sections for each of these areas: Why each section is important.

**LIFE-** Who are you? It sounds like an easy answer but when applying for any sort of benefits or services this is always what is asked first. The documents verify citizenship, marriage status, and many other important questions asked.

**LEGAL-** Planning ahead with Powers of Attorney forms is one of the easiest ways to protect you and make sure your wishes are followed. This section is where you can store the originals. Also documents such as your will or trust information are also important for your loved ones to have immediate access to in case something happens.

**PROPERTY-** What plans have you made for your property to transfer after you pass? Have you named a beneficiary? Is the house in joint tenancy? Looking ahead to make sure an "action" that will occur upon your passing regarding your house and properties is an important part of overall planning. Remember to also plan for your car, and any other property.

**HEALTH CARE-** when a crisis happens it is important for the person advocating for you knows who to call, where your medical records are and what medications you are taking. This tab allows you to organize this information clearly. Remember to keep it updated as your situation changes.

**FINANCIAL-** It is easy to overlook assets – this tab allows for you to organize what you have and make sure the person who is using this folder knows where everything is and how to access. Names and phone numbers of your financial planners and or banking information is also important.

**INSURANCE-** So often, our insurance dictates what care options we have. Keeping track of insurance cards and handbooks as well as contact information is crucial to accessing care options.

**CONTACT NUMBERS-** So many people keep their phone numbers in their phones, what if that can not be accessed? Having those important phone numbers available and written out can save a lot of time for your loved one.

**PETS-** Make sure you leave details about any pets you have. Veterinarians, medications, who would like the pets to go to etc.

**PASSWORDS -** This is a sign of the times, we have SO many passwords now to remember, if there was a crisis would you agent be able to gain access to what is needed?

**FINAL WISHES-** This section provides an opportunity to tell your family what you want for your final wishes. What songs do you want played at your funeral? Do you even want a funeral? Where do you want your ashes scattered? What kind of flowers DON'T you want at your funeral? Also do not forget about final wishes in terms of end of life- is it important to you that you are not kept alive with life support? What things would you want, or not want if you can not speak for yourself? If it is important, you have chocolate ice cream every night, then tell someone!

**The following pages are the tabs for each section of your Go To Book. Don't be overwhelmed to try to fill this all at once, maybe take one section at a time. Before you know it your Go To Folder will be complete.**



PREPARING THE "GO TO FOLDER"

# LIFE

- Birth certificate
- Copy of passport
- Marriage License
- Identification
  - driver's license
  - state issue ID
  - tribal government ID
  - Military ID
- Marriage Certificate/Divorce Decrees/Death certificate
- Military Discharge papers
- Social Security Card (copy)
- Social Security award letter
- Family tree ( who is who) and contact info



PREPARING THE "GO TO FOLDER"

# LEGAL

- Maiden Name if applicable
- Financial POA
- Health Care POA
- Mental health POA ( If your state has one)
- Living Will
- Last Will and Testament
- List - Who you want to get your stuff
- Trust ( where to find it) ( name of attorney)
- POD – Payable on Death
- TOD- Transfer on Death
- Beneficiary deeds



PREPARING THE "GO TO FOLDER"

# **PROPERTY**

- Promissory notes/property agreements
- Car title and registration
- Home deed or note
- RV/Boats/ATV titles
- Tax assessment letter for home/s
- Deeds to all property owned
- Mortgage bill
- If renting any property, note/contact info/contract
- Oil Rights/Mineral Rights
- Home Owners Association letter/payment



PREPARING THE "GO TO FOLDER"

# **HEALTH CARE**

---

- Name of doctors
- List of prescriptions
- Name of Pharmacy
- Allergies



# FINANCIAL

---

- Banking info – log in info
- Account info for
  - Checking
  - Savings
  - money market
  - mutual funds/bonds
  - brokerage accounts
  - credit union
  - safe deposit box
- Income information
  - Social Security amount
  - pension letter
  - veterans award letter
  - railroad retirement
  - Other income



# INSURANCE

- Medicare Card
- All other insurance cards
  - Part D card
  - Supplement card
- Overview of what is covered/Benefit Summary
- Homeowners insurance
- Life insurance
- cash value statement
- Long term care insurance policy
  - statement of benefits





PREPARING THE "GO TO FOLDER"

# CONTACT NUMBERS

- Family
- Legal
- Doctor
- Tax
- Neighbor
- Vet
- Home Care Provider
- Hospice



PREPARING THE "GO TO FOLDER"

# PETS

- Name of Pets
- Veterinarian, contact info
- Medications



PREPARING THE "GO TO FOLDER"

# **PASSWORDS**

---

All Online accounts



PREPARING THE "GO TO FOLDER"

# **FINAL WISHES**

---

- Cremation Directive
- Burial Plan
- Prepaid Funeral information
- Wishes for funeral
- Wishes/Plan for any pets