



New York Life LifeFolio Checklist

The Company You Keep

Organizing our lives has become a popular theme. From the way we organize our closets, to how we manage our workflow at the office, to how we maintain and record the many important details of our lives.

However, if hard pressed, most people will have a difficult time locating their critical documents when a major life event occurs. That is why we have created the New York Life LifeFolio Checklist.

Your Name: _____

Your Address: _____

If you have any questions, or need help filling out your LifeFolio Checklist, please call your New York Life agent:

Name: _____

Phone Number: _____

Date: / / Last updated / /

Whether you are changing jobs, buying a home, caring for an aging loved one, experiencing a death in the family, or planning your retirement, events can send you into a document search tailspin.

Just think about how many documents the bank requests when you apply for your home mortgage or the litany of current and historical documents that are needed to settle an estate when someone has died.

Because we don't tend to deliberately sit down and document everything we have or might need to prepare for such events, unexpected circumstances send most of us scurrying to collect what is required. Until now.

The New York Life LifeFolio Checklist will help you and your family organize the key aspects of your life in an easy-to-complete way that you can share with those close to you, as well as your investment professional, attorney, accountant and your executor/executrix.

Completing the LifeFolio Checklist may be one of the easiest, but most important gifts you can give yourself and your family. We suggest you store your important documents in a safe place, preferably in a locked, fireproof filing cabinet, safety deposit box¹ or safe. But remember to share access with a trusted friend or family member.



Key Contacts	Office Phone	Cell Phone
New York Life Insurance Agent Name:		
CPA/Accountant Name:		
Attorney Name:		

General Items	Location
The following general documents should always be readily available.	
Adoption Papers	
Birth Certificate	
Driver's License Number and Expiration Date	
Marriage/Domestic Partnership/Civil Union Certificate	
Passport/Citizenship (Naturalization) Papers	
Pre-nuptial Agreement	
Safe and Combination	
Safe deposit box(es) and keys	
Separation or Divorce Papers	
Social Security Card	

Emergency Papers and Information	Location
The items below may be needed when someone becomes seriously ill.	
Living Will/Health Care Proxy	
Durable Power of Attorney ²	
Financial Institution's Proprietary Power of Attorney ³	
Beneficiary Forms for IRAs, 401(k)s, or other Benefits Plans	

The items below may be needed soon after someone dies.	
Cemetery Plot Deed	
Charitable Donation Preference(s)	
Burial Instructions	
Death Certificate ⁴	
Funeral Home Preference & Information	
Information for Obituaries (Resume)	
Last Will and Testament ¹	
Letter of Instruction (if available) from deceased to his/her executor/executrix	
Military Discharge Papers ⁵	
Phone Number/Address of County Surrogate Court ⁶	
Pre-paid Cremation Documents	

Life Insurance, Annuities & Other Insurance Policies	Location
Life Insurance policies as well as any variable or fixed annuity documents needed to settle claims.	
Group Life Policies	
Health and Accident Insurance ID Cards & Claim Records	
Life Insurance Policy Documents	
Mortgage Insurance Policy	
Travel Insurance Policy	
Variable Annuity or Fixed Annuity Statements/Documents	
Beneficiary Forms for Insurance and/or Annuity Policies	
Long-Term Care Insurance Policy	
Property and Casualty Policy Documents	
Veterans Administration Insurance Papers	

Financial, Bank & Credit Documents	Location
Documents needed to settle outstanding credit accounts and debts, free up necessary cash to settle the affairs of an estate and transfer ownership per Last Will and Testament.	
Appraisal or Inventory of Valuable Items	
Buy/Sell or Partnership Agreements	
Certificates of Deposit (CDs)	
Checks and Checking or Money Market Account Statements	
Credit Cards and Account Statements	
Credit Union Account Books or Statements	
Deferred Compensation Agreement Documents	
Federal/State Gift-tax Returns	
Lawsuit or Documents on Pending Legal Actions	
Loans Outstanding (Money Owed)	
Medical Bills, Prescription Plan Card/Records	
Mortgage Documents	
Motor Vehicle Title Papers	
Passbook Savings Accounts	
Prior Years' Tax Returns	
Promissory Notes (Debts Owed)	
Property and School Tax Records	
Real Estate Deeds, Other Titles of Ownership	
Rental and/or Lease Agreements	
Trust Documents/Agreements	

Investment Documents	Location
Documents needed for the transfer of ownership per Last Will and Testament and credit applications.	
Alternative Investment Documents (including K-1s)	
Bearer Bonds Not Held in an Account	

Investment Documents (Cont.)	Location
Beneficiary Forms for IRAs, 401(k)s, or Other Benefit Plans	
Company Retirement Plan Statements from all Employers	
Documents Showing Cost Basis of Securities Owned or Sold	
Individual Retirement Plan Statements	
Investment Club Documents/Records	
Mutual Fund Account Statements	
Online Securities Transaction Information	
Other Company Benefits (e.g. Deferred Compensation)	
Stock Certificates Not Held in an Account	
529 College Savings Plan Statements	

When To Contact Your New York Life Agent

As you move through the various stages of your life, remember that you have a valuable resource — your New York Life agent.

He or she is highly-trained and available to review your insurance and financial needs and recommend adjustments as your circumstances change. In addition to scheduling regular financial check-ups, your New York Life agent should be contacted in the event of:

- An engagement or marriage
- The birth/adoption of a child or grandchild
- The purchase of a new home
- A change or loss of job
- Separation or divorce
- The death of a close family member
- Sudden illness or tragic loss of a loved one
- Sudden financial inheritance or windfall

As you seek financial security for yourself and your loved ones, you want the best. New York Life agents, widely recognized as the best-trained professionals in the industry, can help you determine your personal financial objectives and how to achieve them.

Contact your New York Life agent today and find out why we are *The Company You Keep*[®].

¹ Wills should never be stored in a safe deposit box. Instead, Wills should be kept in either a lawyer's Will safe or fireproof safe at home.

² The right of survivorship — assets held in this manner are not subject to probate (unless both parties are deceased); instead, the survivor simply provides evidence of death to the appropriate financial institutions so that the title can be changed.

³ Some financial institutions may refuse to accept a standard Power of Attorney.

⁴ The executor/executrix should obtain a sufficient number of death certificates for transferring ownership of accounts, titles, etc.

⁵ Veterans receive a small stipend toward burial expenses.

⁶ Note: The county court or clerk's office where the decedent resided handles the estate matters and will probate the Last Will and Testament.

The preceding information has been provided for informational purposes only. New York Life does not provide legal, tax or accounting advice. Please contact your own advisors.



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