

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	
Beneficiary forms for IRAs, 401(k)s, or other benefit plans	
Company retirement plan statements from all employers	
Documents showing the 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 checkups, 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, among the best-trained professionals in the industry, can help you determine your personal financial objectives and how to work towards them. **Contact your New York Life agent today.**

¹ Some financial institutions may have a specific power of attorney form.
² The estate representative should obtain a sufficient number of death certificates for transferring ownership of accounts, titles, etc.
³ Some veterans may be eligible for burial allowances. Please contact the U.S. Department of Veterans Affairs for more information.
⁴ Consult your attorney to assist with handling estate matters.
⁵ Consult your attorney if you have any additional questions about wills.

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 professional advisors regarding your particular situation.

New York Life Insurance Company

51 Madison Avenue
New York, NY 10010
www.newyorklife.com
14312C.072020 SMRU5051011 (Exp.08.01.2027)

LifeFolio: Checklist

Getting started with your LifeFolio Checklist.

Keeping track of important information is essential. However, 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.

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 stack 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 might need to prepare for such events, unexpected circumstances send most of us scurrying to collect what is required. Until now.

This will help you and your family organize the key aspects of your life in an easy-to-complete way that you can share with loved ones, your investment professional, attorney, accountant, estate representative, and anyone else who may need access to your important information.

Completing the checklist may be one of the easiest and most helpful things you can do for yourself and your family. We suggest you store this and your other important documents in a safe place. Remember to share access with a trusted friend or family member.

Client Name: _____

To review your policy information, go to www.mynyl.com and elect 'my account'. If you have any questions, or need help filling out your LifeFolio Checklist, please call your New York Life agent.

Key contact

Agent Name: _____

Agent Email: _____

Agent Phone Number: _____



Additional contacts	Office phone	Cell phone
CPA/accountant Name:		
Attorney/law firm 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	
Prenuptial 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	
Financial institutions’ proprietary powers of attorney ¹	
Beneficiary forms for IRAs, 401(k)s, or other benefit plans	
The items below may be needed soon after someone dies.	
Charitable donation preference(s)	
Burial instructions and documents	
Death certificate ²	
Information for obituaries (like a résumé)	
Letter of instruction from deceased to his or her estate rep- resentative	
Military discharge papers ³	
Phone number/address of county probate/surrogate’s court ⁴	
Cemetery plot deed	
Funeral home preference and information	
Last will and testament ⁵	

Life insurance, annuities, and other insurance policies	Location
Life insurance policies, as well as any variable or fixed annuity documents needed to settle claims.	
Group life insurance policies	
Health and accident insurance ID cards and 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, and 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	
Documents on lawsuits or pending legal actions	
Federal/state gift-tax returns	
Loans outstanding (money owed)	
Medical bills, prescription plan card/records	
Mortgage documents	
Motor vehicle title papers	
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	
Savings accounts	
Trust documents/agreements	