TAKE ACTION!
ACTIONS TO CONSIDER TAKING NOW

1. **PULL A CREDIT BUREAU REPORT**
   (https://www.annualcreditreport.com/)

2. **OPEN A NEW CHECKING ACCOUNT IN YOUR NAME ONLY** *if you do not already have one*

3. **OPEN AT LEAST ONE CREDIT CARD IN YOUR NAME ONLY**

4. **MAKE A LIST OF ALL PASSWORDS**
   (See Password List)

5. **GATHER CONTACT INFORMATION FOR PROFESSIONALS YOU USE:**
   (See Contact List)
   - CPA
   - Attorney that drafted your wills
   - Banker
   - Financial Advisor
   - Investment Manager
   - Insurance Representative

6. **START PUTTING DOLLARS AWAY FOR LEGAL COSTS**

7. **CONSIDER OPENING A POST OFFICE BOX**
   if you do not want your mail to come to your home

8. **CHANGE YOUR BENEFICIARIES ON RETIREMENT ACCOUNTS**
   (IRA's, 401k Plans, Pensions, Life Insurance Policies)

9. **CHANGE YOUR ESTATE DOCUMENTS**
   - Will
   - Power of Attorney
   - Durable Healthcare Power of Attorney

10. **GATHER DOCUMENTS TO BUILD A PERSONAL FINANCIAL STATEMENT**
    (See Building a Personal Financial Statement)

    DOCUMENTS TO SHOW WHAT YOU OWN
    - Deed to house (it will show titling)
    - Investment Account Statements (last monthly statement for each account)
    - Retirement Accounts, IRA's, 401-K's, Profit Sharing accounts, Pension statements
    - Bank Accounts Statements, Checking, Money Market, Savings (it will show amount and titling of account)
    - Custodian accounts, 529 Plans
    - Life Insurance Policies (if applicable)
    - Long Term Care Policies (if applicable)
    - Annuity statements (if applicable)

    DOCUMENTS TO SHOW WHAT YOU OWE
    - Mortgage loan documents, including Equity Lines of Credit (HELOC or ELC) (it will show interest rate and who is on the debt)
    - Annual Property Tax Bill
    - Credit card Statements (it will show what is owed and owner of card)
    - Auto Leases (If applicable)

    DOCUMENTS TO SHOW WHAT YOUR HOUSEHOLD INCOME IS
    - Copy of last three years tax returns

TAKE ACTION!
ACTIONS TO CONSIDER TAKING NOW

PERSONAL FINANCIAL STATEMENT

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Partner, Director of SignatureWOMEN

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Partner

CLARA C. PARRIS,
CFP®

Advisor

If you would like to have a confidential conversation and learn more about how **SignatureWOMEN** can possibly be of help, please reach out to **Jamie McCusker Gentry** at Jamie.Gentry@SignatureFD.com, **Victoria Shackley** at Vicki.Shackley@SignatureFD.com, or **Clara C. Parris** at Clara.Parris@SignatureFD.com.

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