Quincy Cass Associates, Inc.

Documents to prepare before you pass away

The passing of a loved one is never easy, but you can help to reduce emotional stress for those grieving by having the following information, documents, and instructions prepared in advance.

THE ESSENTIALS:

- Trust documents
- Durable power of attorney (diminished capacity)
- o Funeral Arrangements:
 - Contacts (friends, family)
 - Disposition of body
 - Burial instructions
- Liturgy
- Obituary information
- Will

PROOF OF OWNERSHIP

- List of bank accounts / brokerage accounts
- List of username and passwords
- List of safety deposit boxes
- Housing, land, cemetery deeds
- Escrow mortgage accounts
- Proof of loans made & debts owed
- o Vehicle titles
- List of partnerships, corporate operating agreements
- Last two years of filed tax returns

HEALTHCARE

- Personal and family medical history
- o Medical healthcare power of attorney
- Authorization to release medical Information
- Do not resuscitate instructions (DNR)

RETIREMENT & LIFE INSURANCE

- Individual retirement accounts (IRA)
- 401K accounts
- Pension documents
- Annuity documents

MARRIAGE & DIVORCE

- o Marriage license
- Divorce papers



Information provided in this document are for informational and educational purposes only and are not a recommendation to take any particular action, or any action at all, nor an offer or solicitation to buy or sell any securities or services presented. It is not investment advice. Quincy Cass Associates does not provide legal or tax advice. Quincy Cass Associates, Inc., a registered broker/dealer, and member of FINRA (www.finra.org) and SIPC (www.sipc.org). SIPC provides protection of up to \$500,000, including a maximum of \$250,000 for cash balances. QCA Capital Management, Inc. is a SEC-registered Investment Adviser, and a wholly owned subsidiary of Quincy Cass Associates, Inc.