



Legacy and Family Document Organizer

Session 7 - Legacy, Integration and the Freedom Plan | Participant Resource | Version 1.0

Privacy: Keep this resource for your personal use. Do not write account numbers, passwords, Social Security numbers, full birth dates, or other sensitive identifiers.

Locate and organize - do not list sensitive numbers here

Will or trust location: _____

Advance directive location: _____

HIPAA authorization location: _____

Medical power of attorney location: _____

Durable financial power of attorney location: _____

Beneficiary confirmation records: _____

Key professional contacts: _____

Legacy conversation

Person or people I need to speak with: _____

What they need to know: _____

Conversation date: _____

Education notice: FFES provides general financial education, not individualized investment, tax, legal, insurance, credit, mortgage, Social Security, Medicare, pension, or estate-planning advice. Rules and individual circumstances differ and can change.