



280 E. Thousand Oaks Blvd. #B
Thousand Oaks, CA 91360

Important Information About Your Family Finances On Reverse Side!

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Thinking of buying
or selling Real Estate?
Contact...**



ERIKA NIELSEN

REALTOR®

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"Your Neighborhood Expert and Neighbor!"

If your property is already listed with another agent, this is not to be considered a solicitation.

What All Family Members Need To Know When It Comes To Family Finances

Parents Need To Gather:

- Trusts, wills, powers of attorney and other estate-plan documents.
- List of assets investments, investment properties (with their value), plus a list of outstanding debts.
- Account numbers for bank and brokerage accounts.
- Deeds for the family house and other real estate.
- Social Security and Medicare cards (copies).
- Current information for any loans - mortgage, auto loans and credit cards.
- Insurance policies - life, health, home, etc.
- Contact Information (name, address, phone number) for doctors, financial advisors and anyone else who might need to be contacted in an emergency.
- Forms listing current beneficiary designations for savings, investments and company pensions.

Kids Need To Ask:

- Do you have a trust? Who did it for you?
- Do you have a will? Has it been updated recently?
- Do you have enough money to last you through retirement?
- Do you have a budget? How much can safely be withdrawn from your savings so your money lasts the rest of your life?
- How are your retirement savings divided?
- Where do you keep important financial information, such as tax returns or a copy of your will?
- Do you have a financial advisor? How long have you worked with him, and how does he get paid?
- Have you made arrangements in case you can no longer live independently? Could your insurance/savings cover long-term health care?
- Who would make necessary financial decisions if you could no longer do it yourself?



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