

Let Your Fingers Do the Walking

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No, this is not a plug for Ma Bell. It's time to get organized, and I don't just mean getting all the mess on your desk into neat little piles, or your back copies of Dynamic Chiropractic in chronological order. What I'm referring to is making a listing of things that will be helpful to you, and in case you are not able, or around, a list for your family. This list can be as extensive as you want it to be. While you are working on it you might as well do it right. Once you have it, it's easy to keep it up to date, and you need to do just that. An outdated list is almost as bad as no list at all.

List of advisors, including name, address, and telephone number:

Attorney _____

Accountant _____

Insurance Agent(s) _____

Financial Advisor _____

Banker _____

Guardian (for minors) _____

List of documents and where they can be found:

Will(s) _____

Safety deposit box number and keys _____

Insurance contracts _____

Deeds _____

Contracts _____

Appraisals _____

Mutual fund certificates _____

Stocks _____

I.R.A.s _____

Retirement plans _____

Old tax returns _____

Pre-nuptial agreements _____

Trusts _____

Benefits booklets _____

Military records _____

Important numbers:

Social Security numbers _____

Insurance policy numbers _____

Tax I.D. numbers _____

Credit card numbers _____

Account numbers:

Checking _____

Savings _____

Money markets _____

CDs _____

Now that you have all this, what do you do with it? You need to create a list that will be handy for your use and accessible to your family. You can put this list on a computer program, if computers are your thing. You can just write it down; not very sexy, but it works. How about putting this on your Rolodex? Now you have it at your fingertips and can keep it updated very easily. Whatever works for you is fine. Just do it, and do it now. By the way, if you come up with a creative way to deal with this list, let me know. I'm always looking for new and creative ideas I can use. I'll even give you credit for it, so drop me a line.

I might not hurt to keep a list of outstanding loans as well. This could also be kept in your Rolodex. Not a bad way to keep track of your loans. List the terms of the loan, interest rate, length of the loan, payments, when due, loan number, lender, and maturity date.

If you use this system and put it all in your Rolodex, you can really "let your fingers do the walking" when you need any information.

Your comments and inquiries may be directed to:

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Please include a self-addressed, stamped envelope. Thank you.

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