


The Life Ledger: Getting Organized for Life

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1

What if?

- Your partner becomes incapacitated
- Your partner dies
- You get sick or incapacitated
- You die
- You are robbed
- Your identity is stolen
- You experience a natural disaster or a terrorist attack

OR

- Life continues smoothly and nothing bad happens 😊



2

You or your agent will need information.

**You or your agent will need
access to money.**



3

The Life Ledger

- Personal Information
- Relationships
- Education
- Pet Care
- Medical Information
- Financial Information
- Legal Information
- Serious Illness and End of Life Care Information
- At the Time of My Passing
- My Wishes and Last Words
- Photocopy of Contents of Wallet



4

Sources of Frustration for Families/Agents

- Not knowing how much money there is and where it is
- Not knowing whether there is a safe deposit box, where it is, what is in it, where the key is, who can get into it
- Not knowing what the bills are, how they are paid, none are on autopay
- Too many bank and credit card accounts
- Not knowing the passwords/security questions for computer accounts



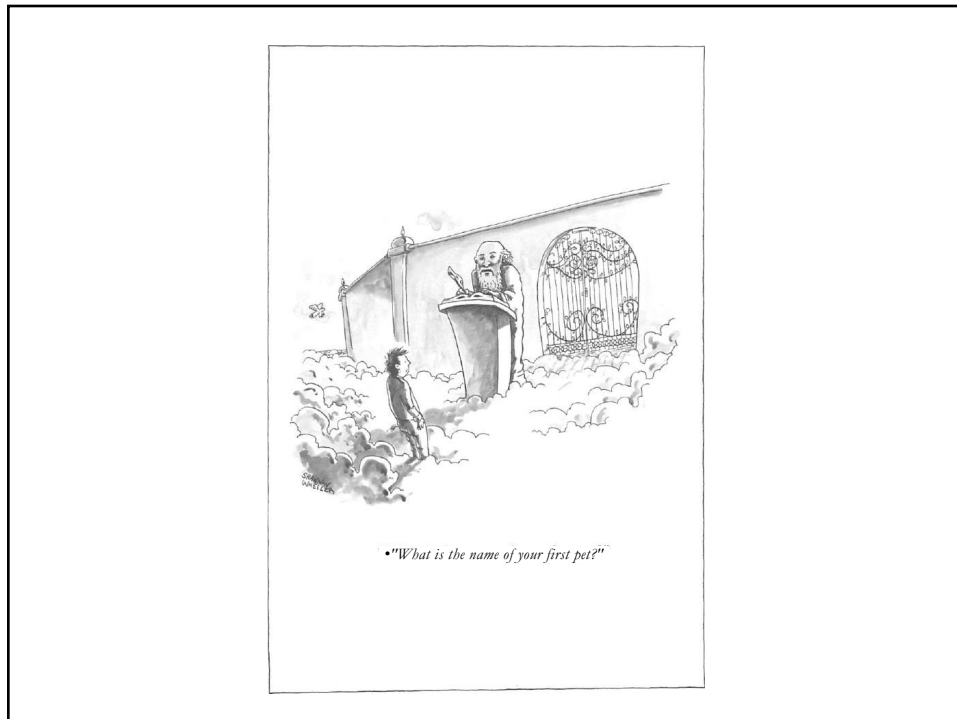
5

Sources of Frustration for Families/Agents

- Not knowing how accounts are titled and whether trusts are funded correctly
- Not knowing if there is long term care insurance and the policy specifics
- There are individual stocks that are not organized and dividends come by paper check, not direct deposit



6



7

“ _____ ” Binder/Folder/File

The name doesn't matter. Call it whatever you like.

The list format doesn't matter.
Take the Life Ledger and make it your own.

*What matters is that you
collect the information in one place, **update** it periodically,
and **share** it with those who need to know it.*



8

What Goes in the Binder/Folder/File?

- Life Ledger

Actual Items or Location Information for:

- ID docs – passport, birth certificate, social security card, military discharge papers, etc.
- Cash
- Safe deposit box keys
- Flash drives with key documents and/or pictures (if not in the cloud)
- Anything else you think is important enough to grab in an emergency



9

Where to Store the Binder/Folder/File

- Hiding in plain sight
- Fireproof safe
- NOT IN THE SAFE DEPOSIT BOX



10

Online Services

- Everplans
- LastPass, Dashlane or other online password vault
- Your investment advisor's system

If you save your list in the cloud (Dropbox, Google Drive),
PASSWORD PROTECT IT!



11

Your Questions/Concerns



12

Thank you!

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