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Get It Together: Organize Your Records So Your Family Won't Have To



Synopsis

Get your life organized with the best workbook available! Paperwork, personal information, and passwords aren't always easy to find, and organizing your records can seem like an intimidating task. But, whether you need to get a handle on records for yourself, your family or your executor, Get It Together will show you how to organize: instructions for survivors secured places and passwords estate planning documents funeral arrangements employment records insurance policies tax records retirement accounts government benefits real estate records and more. For those concerned about sensitive information like passwords, Get It Together lets you: Securely store an unlimited number of passwords while keeping them handy. Decide whether you want to record your information electronically or by hand. Choose the way you want to organize your passwords—for example, alphabetically or by type of product or service. Easily add related notes, such as security questions. This workbook provides a complete system for structuring and organizing your information and documents into a records binder. For each topic, you will find helpful content, rich resources and step-by-step instructions. All forms are downloadable through a link printed in the book.

Book Information

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Customer Reviews

" Provides a guide to collecting and organizing important records, and how to store and protect them, for readers and their family members." Reference & Research Book News • Offers a detailed, step-by-step process for gathering records and key documents and organizing them for future use. • Sacramento Bee • Get It Together is a must-have book/planner for every adult. •

About.com "Even with a will, the death of a loved one can leave family members without a detailed knowledge of the deceased's financial affairs. Their will, insurance policies, tax records, financial accounts, final arrangement wishes, even personal letters to loved ones can often be lost or dauntingly difficult to find. Intended for seniors and those facing a terminal illness as well as their children and caretakers, this book shows how to organize one's personal papers in a manner which will make it easier for loved ones to find and be able to use in the handling of the estate. The authors show how to catalog financial paperwork into a cohesive planner, how to safely store digital passwords so that loved ones can use them when needed, and how to help family and caretakers find the information they need to make final arrangements and execute the estate." Eithne O'Leyne, Editor Ringgold, Inc. ProtoView

This workbook is a complete guide to collecting and organizing important papers and information, and it makes the process easy for the reader and for loved ones who will wrap things up when the time comes. The author leads readers through the process step by step, prompting them to provide information that will make sure family members don't lose out on money (life insurance proceeds often go unclaimed, for example), legal documents (a will is no good if no one knows where it is), and items of emotional significance (heirlooms, family photos and history).

This book helped me tackle a task that I had been putting off for way too long. My wife & I have wills, and estate planning documents and we knew where those were, but other than that, our stuff was scattered everywhere. I tend to do most of the financial "stuff" in our house (bank accounts, insurance policies, etc...), and it is amazing how many different things we have accumulated during our marriage. I was scared that, if something happened to me, my wife wouldn't know where my life insurance policy was stored, or where the deed for our house was located etc...I got this book, and went to Staples and got the binder etc... I will say that this author also sells a binder / sheet protector combo deal. That probably would have been less expensive than my route. Once I started working the book, it is very easy to follow. It is broken down into sections. The premise being that you take your three ring binder, and break it into the same sections. Each section covers one topic. You put all relevant documents into that section of your binder. Some of these, you'll need to probably create, and some are probably more important than others. One nice part about this book is how comprehensive it is. While I can't say I used every possible page, I did find myself using a lot more than I would have otherwise thought I would need. The book also has a number of forms that you can pull out, write on, and then put them in your binder if you choose. Another option it gives is

to go to a website, and download the forms, type on them, print them out, and then put them in your binder. Again, some you will choose to use, others won't apply to your situation. All in all, this book served its purpose very well. My family's "stuff" is much more organized. Now, when I get to go to see Jesus, I know that my wife can pull this one binder, and have all our family's relevant information at her fingertips. That gives me peace of mind.

When I ordered this book I thought it was something different. What I got was better than I was expecting. I needed a system to get all my accounts, records and important papers together. I was in the process of getting things ready for estate planning for my attorney and family. This book allowed me easier organization of all the necessary records in a very easy to follow method. I had this book for a long time and never reviewed it for some reason. I probably would have not reviewed it either. Recently my brother passed away. His widow and kids had so many problems getting his estate in order because his important papers and accounts were scattered everywhere. When asked for help I saw just how unorganized he was. I didn't know where to start until I remembered how I set myself up using this book. I grabbed the Get it Together book in hand and started from page one. With each chapter we were able to gather the papers necessary by following the guidelines and charts. It took awhile but eventually got his estate in order and presented it to his attorney and Executor. I can't stress enough how well this publication helped. Not every page is needed but of course each estate is different and I'm pretty sure just about every need will be addressed. I should have reviewed this book earlier and I'm sorry I didn't. This review was written without any financial considerations. Full retail was paid.

This looks like a whole law course. For me it is too voluminous. I'd rather have something simple and concise to just give my family the info they need to know.

I'm like this. I'm slowly working through it, hoping to make it easier for my personal representative to close my estate when I die.

This is just what I need as I am getting to move and home and I need to have legal papers ready for the family.

Much help in knowing what and how and where to keep important papers, etc. to make it easier for family after my passing.

I've only had a chance to skim through the book but there's a lot of good information and the option to download the many forms that are included in the book if you don't want to use them or cut them out of the book. It covers just about everything but I haven't found much about annuities - a form to explain basis, owner, annuitant, penalties, etc. The explanations are clear and I think the forms can be download to Word so they can be edited. The book is about an inch thick and hard and cumbersome to curl up in bed with (where I like to do my reading) but well worth it.

Working my way through the process....very thorough, can be a bit overwhelming

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