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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.

Book Information

Series: Get It Together

Paperback: 416 pages

Publisher: NOLO; Sixth edition (October 31, 2014)

Language: English

ISBN-10: 1413320716

ISBN-13: 978-1413320718

Product Dimensions: 8.5 x 1.2 x 11 inches

Shipping Weight: 2 pounds (View shipping rates and policies)

Average Customer Review: 4.4 out of 5 stars See all reviews (173 customer reviews)

Best Sellers Rank: #23,271 in Books (See Top 100 in Books) #6 in Books > Law > Estate

Planning > Wills #7 in Books > Business & Money > Insurance > Health #8 in Books > Law >

Estate Planning > Estates & Trusts

Customer Reviews

I bought this book thru in June 2006 because of my experiences working with a close friend who had just lost his father rather unexpectedly. My friend faced a monstrous task of trying to track down his father's assets, business records, last will, credit accounts, etc. just to scratch the surface. As a participant in his frustration, I began to think about the arrangement of my personal life and how my loved ones would tend to my estate. "Get It Together" brings so much to the table to deal with. I think most people refuse to face their mortality and the task of making such arrangements, let alone there really is a large volume of papers, decisions, conversations, and organization to be handled. GIT is very thorough in all topic areas (see Table of Contents). The book discusses the emotions involved with each topic area, numerous websites to obtain additional information, what to get a copy of,

keeping the info current and arranging your "estate" or life, for that matter, to benefit those close to you. My parents or other people I look up to would never or be highly uncomfortable discussing these topics in detail. This book is perfect to compensate for the lack of those conversations. Now, just a warning for those willing to purchase and conform to this book. I was quite diligent in following all their instructions and recommendations to the "t". It took longer than expected, about 12 weekends, until I had gathered and organized everything to my satisfaction and I don't have a wife, kids or other complicated situations...just me alone. But I have such a peace of mind that my successors will have no trouble making decisions or tracking down stuff because it's all there with explicit directions from me.

Let's be clear - this is not a time management book or a guide on how to set up your own family records retention and filing system - this is a book squarely aimed at the head of a household, whether you live on your own or with your family. And it lays out pretty clearly the why: someday you are going to be incapacitated or dead, and you do not want people's thoughts of you to be sullied with frustration running something like "What a mess! Why couldn't he/she put his house in order? Where are the online account passwords? What do you mean that's in the safety deposit box? What safety deposit box?" and so on. This goes beyond estate planning (with its tax issues, and so on) to the crux of being responsible to your family and close friends. And that's why I like this book. Here are some key points that I found extremely helpful in the book (all of this is to be recorded in the "important records planner" template provided in the book):- For any program (like a 401(k), IRA, insurance, etc.) that doles out money list the names and SSNs of the beneficiaries and who has decision-making power if you are incapacitated; and who at the program (say your 401(k)) has been your main contact person- The location of your safety deposit box (if you have one), a list of what **should** be in there, and where the key(s) are kept- A password and online account list, including the list of security questions/answers (assuming you remember...)- Location of any contracts or agreements (say for a rented storage area)- Location of important equipment or household warranties, user manuals, etc.- List of anyone (or any organization) that depends on you (including their relationship with you, contact information, what you provide and how often, etc.

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