

A connection to financial, legal and advance care planning resources

Magnolia *Purpose in Planning*® is a resource designed to help support people living with cancer, Alzheimer's disease or dementia in planning for the future. A simple way to start getting your financial and legal affairs organized is by compiling important information, documents and materials including, but not limited to:

Personal & Family Records



Social Security card, driver's license & IDs



Birth certificates for yourself, spouse & children



Marriage license &/or proof of divorce



Insurance cards (health, life, property, homeowner's, etc.)

Financial Accounts & Property Records



Bank account information



Proof of car ownership, registration & insurance



Real estate deed, title policies, mortgages, etc.



Business ownership & financial records

Estate Planning Documents



Will, trust
& financial
power
of attorney



Retirement or
pension plan
information



Advance health
care directives



Funeral or
memorial
instructions



For additional financial, legal and advance care planning resources, including a full planning checklist* visit

MagnoliaPurposeinPlanning.com

*Planning checklist developed by and is property of Triage Cancer

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