

# Worksheet: Managing A Large Cash Windfall

## Getting Started

If you recently came into a lot of money -- inheritance, legal settlement, gambling/lottery win – here's how to get organized and plan for your new wealth.

This worksheet includes the following:

- Professionals & Trusted Advisors
- Estate Planning Documents You Have Or Need
- Types Of Insurance You Have Or Need
- Financial Accounts & Investments
- Property & Assets
- Debts & Loans
- Worries & Concerns
- Future Purchase Wishlist
- Charity & Gifts

## Remember

[Create an Everplan](#) to easily and securely update and share this vital info with the people you love and trust.



## FINANCIAL ACCOUNTS, INVESTMENTS, RETIREMENT FUNDS

Have a recent account statement for each, location of related items (example: checkbooks, passbooks), and account/login and password for online management.

- |   |  |
|---|--|
| <input type="checkbox"/> Checking               | <input type="checkbox"/> Savings   |
| <input type="checkbox"/> Money Market           | <input type="checkbox"/> Certificate Of Deposit (CDs)                    |
| <input type="checkbox"/> Stocks                 | <input type="checkbox"/> Bonds   |
| <input type="checkbox"/> Mutual Funds           | <input type="checkbox"/> Military Benefits                               |
| <input type="checkbox"/> 401(k)                 | <input type="checkbox"/> 403(b)  |
| <input type="checkbox"/> IRA                    | <input type="checkbox"/> Roth IRA  |
| <input type="checkbox"/> Pension (SEP / SARSEP) | <input type="checkbox"/> 529/College Savings                             |
| <input type="checkbox"/> Emergency Fund         | <input type="checkbox"/> Other (Example: Trust Fund, Specific Benefits): |

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## PROPERTY & ASSETS

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|--|--|
| <input type="checkbox"/> Real Estate (owned)   | <input type="checkbox"/> Real Estate (rented/leased) |
| <input type="checkbox"/> Motor Vehicles  | <input type="checkbox"/> Boats, Other Vehicles       |
| <input type="checkbox"/> Valuables & Other (Collectibles, Artwork, Jewelry, etc...): |  |

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## DEBTS & LOANS

This is a chance to erase all those debts and loans, so make sure you account for them all.

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|---|--|
| <input type="checkbox"/> Credit Card Debt               | <input type="checkbox"/> Mortgage  |
| <input type="checkbox"/> Loans (Car, Student, Personal) | <input type="checkbox"/> Other (Example: Debit Card, Settlements/Support): |

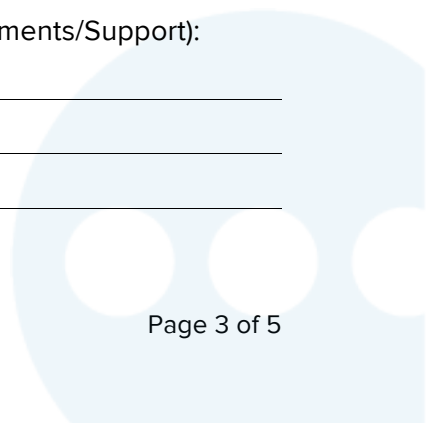
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### WORRIES & CONCERNS

With wealth comes stress. Write down every possible worry you have as a starting point for when you speak with your team of professionals and trusted advisors.

What are some of the issues or problems you see arising from your newfound fortune? (Example: taxes, greedy family, shady friends or acquaintances):

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### FUTURE PURCHASE WISHLIST

Here's where you get to have some fun -- because what good is having money if you can't spend it? Write down whatever you desire knowing this list can be altered depending on how much you'll be able to spend.

Things you need (Example: home repairs, medical treatment not covered by insurance):

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Things you want (Example: mansion, fancy car, lavish trip):

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## CHARITY & GIFTS

The most rewarding part of a newfound fortune is the ability to share it with friends, family, favorite causes, and charities.

What causes do you find most important?

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What charities do you find most important?

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List out some people in your life you believe deserve a gift in the form of cash or assets.

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## NOTES & PERSONAL THOUGHTS

Use this section for any important information, personal thoughts, or anything we may have missed. Remember, you can do this all online. Create an Everplan so this info, along with much more, is neatly organized, securely stored, and easy to share with the people you care about most.

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## CREATE YOUR EVERPLAN NOW: [www.everplans.com](http://www.everplans.com)

Create, store, and share all of the digital and online account information in this document (and so much more) in a personalized Everplan so it's accessible to those who will need it.

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Learn more about creating an Everplan at [www.everplans.com](http://www.everplans.com).

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