



Episcopal
Foundation
of Dallas



MONDAY MINUTE





1

WHERE ARE YOUR IMPORTANT DOCUMENTS?

Wills, powers of attorney, insurance policies, and financial account information are important parts of your estate plan.

Keeping them organized and accessible can make things easier for you and your loved ones.



2

WHY IS IT IMPORTANT?

In an emergency, your family may need to quickly locate important information.

Consider keeping a list of:

- Estate planning documents
- Insurance policies
- Financial accounts
- Important contacts
- Property or business information

Choose a secure location that can be accessed when needed.



3

THIS WEEK'S ACTION STEP

Make a list of your important documents and let a trusted family member or representative know where they can be found.

A little organization today can save your loved ones time and stress tomorrow.