

IN CASE SOMETHING HAPPENS

The following form is designed to facilitate the administration of my/our estate. This document designates locations of important estate documents, and other information that may be able to assist you after my death. **If something happens to one or both of us, please contact our financial advisors at Bernicke Wealth Management, Ltd. to discuss the process of settling our estate.**

Bernicke Wealth Management, Ltd.

1565 Bluestem Blvd.

Altoona, WI 54720

phone: (715) 832-1173

email: questions@bernicke.com

ESTATE DOCUMENTS		LOCATION
Last Will & Testament		_____
Durable Power of Attorney		_____
Power of Attorney for Health Care		_____
HIPAA Authorization		_____
Living Will		_____
Marital Property Agreement		_____
Revocable Living Trust		_____
Irrevocable Trust		_____
OTHER DOCUMENTS		LOCATION
Safe deposit box(es)	Yes or No	_____
Letter to the family	Yes or No	_____
Obituary Details	Yes or No	_____

ITEMS TO KNOW

ONLINE ACCOUNT(S) AND PASSWORD(S)

ACCOUNT NAME

LOGIN

PASSWORD

EMAIL ACCOUNT(S) AND PASSWORD(S)

EMAIL COMPANY

LOGIN

PASSWORD

Securities offered through Triad Advisors, LLC, member FINRA/SIPC. Advisory Services offered through Bernicke Wealth Management, Ltd. (Bernicke).

Bernicke is not affiliated with Triad Advisors, LLC. Bernicke is an SEC registered investment adviser that maintains a principal place of business in the State of Wisconsin. Registration does not imply a certain level of skill or training. Neither Bernicke nor Triad Advisors, LLC, provide tax or legal advice. Before making any decisions with legal or tax ramifications, you should consult the appropriate professionals for advice that is specific to your situation.

Bernicke may only transact business in those states in which it is notice filed or qualifies for a corresponding exemption from such requirements. For information about Bernicke's registration status and business operations, please consult the firm's Form ADV disclosure documents, the most recent versions of which are available on the SEC's Investment Adviser Public Disclosure website at adviserinfo.sec.gov. © Bernicke Wealth Management, Ltd.

1565 Bluestem Blvd, Altoona, WI 54720 | 715-832-1173 | www.bernicke.com © Bernicke Wealth Management, Ltd.