Get Your Affairs in Order

The Gift of Clarity for the People You Love

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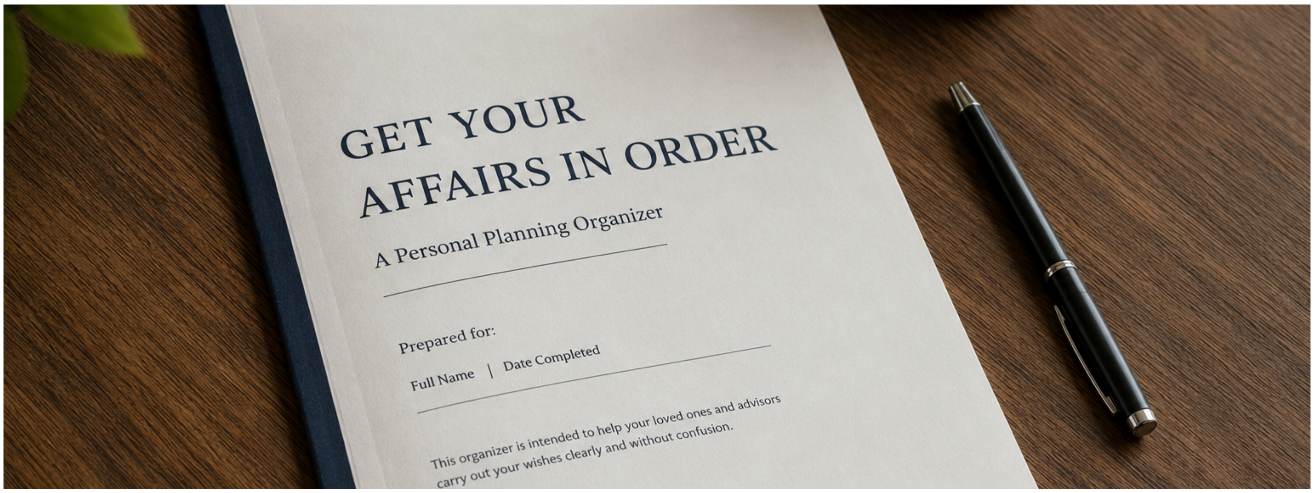


There is a conversation that most families never have — not because they don't care, but because it feels like opening a door no one is ready to walk through. Where are the important documents? Who is the attorney? What were their wishes for the funeral? What happens to the house?

When that conversation is forced by grief, the answers are rarely organized, and the search for them becomes a burden layered on top of loss.

We created our *Get Your Affairs in Order Personal Planning Organizer* for families with $1 million to $10 million because we believe one of the most meaningful things you can do for the people you love is make things clear before clarity is needed.

Your Legal Documents Have a Companion Problem

Most people who have done serious estate planning have the right documents in place: a Will, a Trust, powers of attorney, an advance directive. Their attorney drafted them carefully. They were signed and notarized. And then they were filed away.

The problem isn't the documents themselves — it's everything that surrounds them.

Your executor needs to know those documents exist. Your family needs to know where they are. Your healthcare agent needs to be able to find your advance directive quickly, not three days after the fact. And when multiple advisors are involved — your attorney, your CPA, your financial advisor, your insurance agent — someone needs to be able to connect those dots on your behalf.

Our organizer is designed to serve as that bridge. It doesn't replace your legal documents. It supports them. Think of it as the plain-English companion that lives alongside your estate plan and answers the questions your attorney's paperwork doesn't — where things are, who to call, and what you wanted.

Simplifying What Is Often Unnecessarily Complicated

One of the hardest parts of settling an estate isn’t the legal complexity – it’s the scavenger hunt. A life’s worth of financial accounts, Insurance policies

THE REALITY FOR FAMILIES

When a loved one passes, settling an estate is about more than paperwork—it's an emotional and financial burden.

9–14 MONTHS

Average time to settle an estate in the U.S.

During this time, loved ones are left managing paperwork, finances, and difficult decisions.

70% OF FAMILIES

say it was difficult to find or gather necessary financial information.[1]

Missing or disorganized information creates stress, delays, and unnecessary expenses.

A little preparation today can spare your family a lifetime of stress.

Organization now is one of the greatest gifts you can leave behind.

[1] Source: Caring.com 2023 Wills and Estate Planning Study

digital logins, and personal property doesn't come with a table of contents. For family members who are already grieving, that search can take months and create real financial and legal consequences.

Our organizer gives everything a place. Banking and investment accounts. Retirement plans and their designated beneficiaries. Insurance policies, including who the agent is and where the policy lives. Real estate deeds. Vehicle titles. And yes – digital assets and passwords, which have become one of the most commonly overlooked and most urgently needed pieces of information in modern estate administration.

When a family member or advisor sits down to handle your affairs, they should be able to find what they need on the first try. That is what this guide makes possible.

More Than Logistics: A Space to Document Your Legacy

Organizing your financial life is important. But some of what you leave behind can't be captured on a balance sheet.

Who gets your grandmother's ring? What should happen to the lake house? Is there something you've always wanted to say to your children, your spouse, or a friend – something that would mean the world to them to read?

Our organizer includes space for all of it. A section for specific bequests walks through personal effects and meaningful items, allowing you to name who receives what and why. There is space to record instructions for pets, guidance for your executor on decisions that feel too small for a legal document but too important to leave to chance, and – perhaps most meaningfully – personal letter pages where you can write directly to the people you love.

These aren't legal documents and they carry no binding weight. But in our experience, they are often the pages that matter most to the families who receive them.

The Right Time to Do This Is Now

There is never a convenient time to think about this. There is always something more pressing, more enjoyable, or more comfortable to focus on instead. That is precisely why most families are caught unprepared.

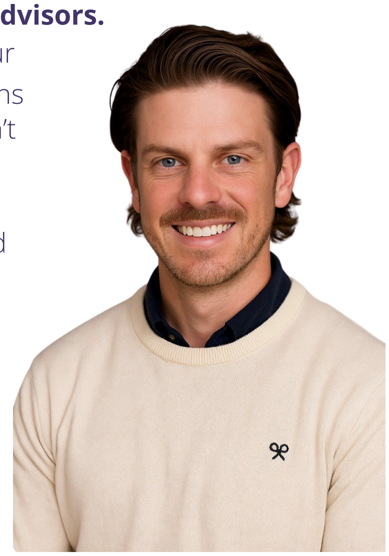
The good news is that putting your affairs in order doesn't have to be a single overwhelming project. It can be done in stages, updated over time, and revisited whenever life changes – a marriage, a new child, a home purchase, a business transition, or a significant shift in your financial picture.

What matters most is that it gets done before it needs to be done. The organizer is designed to grow with you.

Ready to Get Started?
We offer our *Get Your Affairs in Order Personal Planning Organizer* as a complimentary resource for our clients and for anyone who wants to take this important step.

Request your copy by reaching out to our team directly. We'll send it to you along with a brief overview of how to approach completing it.

Or, if you'd like to go further, **schedule a conversation with one of our advisors.** Getting your affairs in order is most powerful when it's coordinated with your broader financial and estate plan – making sure your beneficiary designations are current, your documents reflect your actual wishes, and your family won't be left guessing.



At O'Keefe Stevens Advisory, we help individuals and families make informed decisions around estate planning, retirement distributions, taxes, and long-term financial planning. Whether you're evaluating putting together your estate and legacy plan for the first time or brushing off old documents to ensure they've still got you covered, we're always happy to be a resource.

If you'd like to talk more with our team, here's the link to schedule a Discovery Call.

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