BOOK CLUB AGENDA

1/5/24 WELCOME ZOOM VISIT: introduce book, overview of agenda & expectations LEVEL 1: START WITH YOUR STUFF......1 Passwords, People, Money, and Your Abode ACCESS GRANTED: Passwords & Codes......2 Sharing your phone password 3 ■ Side Mission: Can we see some ID? 5 ■ 1/19/24 Passwords: The next level 6 ■ Password storage methods 8 ■ Keys to the kingdom: Your most important passwords 10 ■ Off-line time 12 ■ Plan of Attack: Passwords & codes 13 ALL YOUR MONEY: Everywhere It Lives.....14 Your financial blueprint 16 ■ Questions for each financial account 17 ■ When the proof is in the paper 18 ■ List your assets 18 ■ Side Mission: Making sure the kids are alright 19 ■ Life with benefits 23 ■ Why you (really) need joint accounts 27 ■ Plan of Attack: Money you have 28 ■ "Safe" deposit boxes 28 YOUR PAD: An Operating System......30 Pool your knowledge 31 ■ Your home matrix 32 ■ Basement 35 ■ Main floor 36 ■ Upstairs 38 ■ Side Mission: Animal instincts 39 ■ The great outdoors 42 ■ Just put it in storage 44 ■ Plan of Attack: Home Operating System 45 ■ Hitting the road 46 MAKING FIRST CONTACT.......47 Your top five contacts 48 ■ What's up, Doc? 51 ■ Money folks 52 ■ Law abiding 52 2/16/24 ■ An unbroken home 53 ■ Side Mission: Parental guidance 55 ■ Hitting the road (or water) 59 ■ Your personal VIPs 59 ■ Plan of Attack: Organizing contacts 60 ■ Show them the way 61 ■ What about family? 61 BREAK TIME: Life's Milestones and Pit Stops......62 LEVEL 2: ASSEMBLE THE PIECES......65 Trusts, Wills, Health Care, and Your Digital Matrix WILLS, TRUSTS, AND POWERS OF ATTORNEY......66 When you're alive: POA 66 ■ When you're dead: Will 70 ■ Side Mission: Taking care of an actual business 74 ■ Plan of Attack: Your legal docs: POA and Will 82 ■ When you're alive or dead: Trusts 86 ■ Plan of Attack: Creating a Trust 92 ■ Letter of Last Instructions 93 ■ Plan of Attack: Letter of Last Instructions 94 MONEY YOU OWE: Debt, Credit & Insurance......96 Credit for organizing 97 ■ Bills: The expected 100 ■ Bills: The unexpected 104 ■

Plan of Attack: Money you owe 106 ■ So. Much. Insurance. 107 ■ Yet. More.

Insurance. 111 ■ Plan of Attack: Insurance 115

3/15/24

AGENDA (continued)

3/29/24	YOUR MEDICAL CHECKUP
4/12/24	LET'S GET DIGITAL
•	Talk the Talk 153 ■ Stealth Talk: How to Gather Info from Loved Ones 156
4/26/24	LEVEL 3: THE FINISHING TOUCHES163 Memorabilia, Letters, Funeral Planning, and Obituaries
	MEMORIES: The Kind You See, Taste, and Hold165 Photo finish 165 ■ Plan of Attack: Physical memories 171 ■ Delicious history 172 ■ Plan of Attack: Recipes 176 ■ Personal antiquing 177 ■ Plan of Attack: Heirlooms
5/10/24	TELLING THE STORY OF YOUR LIFE
5/24/24	IT'S IN THE MAIL: Legacy Letters
6/7/24	IT'S (REALLY) YOUR FUNERAL
	FINAL BREAK TIME230 What Happens If You Don't Plan Ahead?