

IN CASE YOU GET HIT BY A BUS

**How to
Organize Your
Life Now
for When
You're Not
Around Later**

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FOUNDERS OF EVERPLANS
WITH GENE NEWMAN



Welcome!

Behavior Matters Book Club

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Agenda

- Overview of Book and Agenda
- Why In Case You Get Hit By A Bus?
- Protocols/Etiquette
 - Timing (every other Friday beginning on Friday, January 19th, 10:00 AM)
- Discussion Questions & Feedback
- Meeting Recordings and Summaries

BOOK CLUB AGENDA

1/5/24	WELCOME ZOOM VISIT: introduce book, overview of agenda & expectations
1/19/24	<p>LEVEL 1: START WITH YOUR STUFF.....1 Passwords, People, Money, and Your Abode</p> <p>ACCESS GRANTED: Passwords & Codes.....2 Sharing your phone password 3 ■ Side Mission: Can we see some ID? 5 ■ 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</p> <p>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</p>
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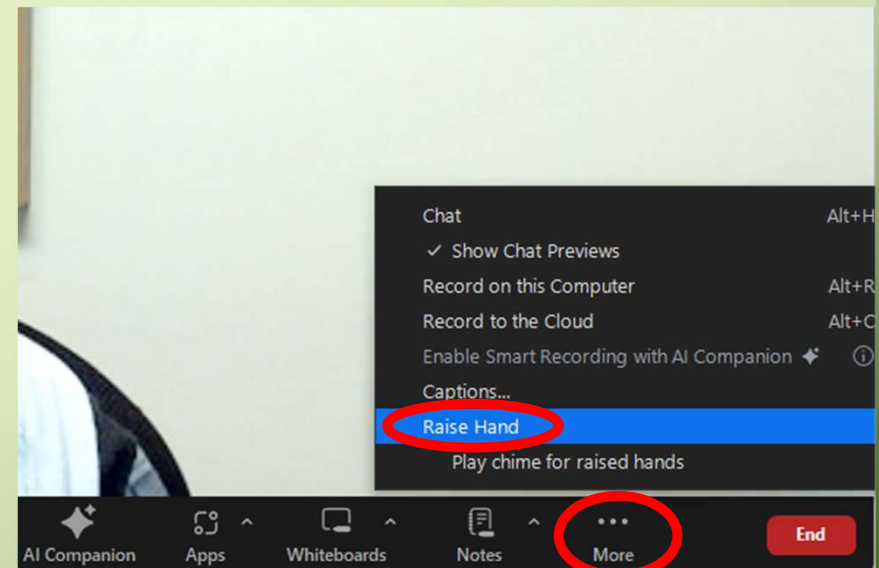
Why In Case You Get Hit By A Bus?

- ✿ Having an organized, well documented plan (*by design*) is an **intentional** choice.
- ✿ Creating a well-lit path forward for your family for when you are not around (*or not able*) can help avoid **unnecessary hiccups**.
- ✿ **Love** or **logistics**?
- ✿ #1 reason we hear is to avoid a mess for heirs or family members and friends operating as a POA/Executor.
- ✿ For the peace of mind that comes from having your things and wishes clearly stated and where to find them can **reduce your worries** and make room to **fully be alive**.
- ✿ To have more flexibility and control.

Why be organized? **For others who matter to you** — *not really for you*.

Protocols/Etiquette

- Arrive on time (we will begin at 10 AM sharp).
- Send questions ahead of time that you would like to address as a group .
 - Please send to Maily Wirks at mwirks@mirusplanning.com
- Come prepared (maybe even with notes) to participate or listen (whatever your preference).
 - Have your book handy
- So we don't have everyone talking at once, you can raise your hand (if camera is on) or use the "raise hand" feature in Zoom.
- Be respectful and curious.
- Have FUN and come to learn.



Discussion Questions/Feedback



Questions I intend to ask:

What came up for you as you read these chapters?

At the end of each session, are there anyways you'd suggest we change up our format to improve? We are learning right along side YOU!

Meeting Recordings and Summaries

- Can't make every meeting? No problem! We will be recording the discussions, so you won't miss a thing. Keep an eye out for an email from us the following week with the details so you can catch up.
- Written summaries and key points will be provided after each call.



Any Questions?



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