

*DELIVERING  
THE  
PROMISE*

**ORGANIZER™**

**FOR THE ESTATE OF:**



**MetLife®**



# INFORMATION ABOUT ASSETS

## HOMES

| Primary Home Address         |          |                    |                         | Vacation Home Address        |          |                    |                         |
|------------------------------|----------|--------------------|-------------------------|------------------------------|----------|--------------------|-------------------------|
| Street                       |          | Apt. #             |                         | Street                       |          | Apt. #             |                         |
| City                         |          | State              | Zip                     | City                         |          | State              | Zip                     |
| Mortgage Holder              |          | Mortgage ID Number | Telephone Number<br>( ) | Mortgage Holder              |          | Mortgage ID Number | Telephone Number<br>( ) |
| Homeowners Insurance Company |          | Policy Number      | Telephone Number<br>( ) | Homeowners Insurance Company |          | Policy Number      | Telephone Number<br>( ) |
| Flood Insurance Company      |          | Policy Number      | Telephone Number<br>( ) | Flood Insurance Company      |          | Policy Number      | Telephone Number<br>( ) |
| Security Company             | Password | Code               | Telephone Number<br>( ) | Security Company             | Password | Code               | Telephone Number<br>( ) |

## AUTOMOBILES

| Make              |               |                         | Make              |               |                         | Make              |               |                         |
|-------------------|---------------|-------------------------|-------------------|---------------|-------------------------|-------------------|---------------|-------------------------|
| VIN Number        |               | Lic. Plate Number       | VIN Number        |               | Lic. Plate Number       | VIN Number        |               | Lic. Plate Number       |
| Insurance Company | Policy Number | Telephone Number<br>( ) | Insurance Company | Policy Number | Telephone Number<br>( ) | Insurance Company | Policy Number | Telephone Number<br>( ) |

## BOAT

## OTHER (Motorcycle/Trailer/Camper/Etc.)

| Make              |  | Serial Number | Motor ID Number         | Make              |  | Serial Number |                         |
|-------------------|--|---------------|-------------------------|-------------------|--|---------------|-------------------------|
| Insurance Company |  | Policy Number | Telephone Number<br>( ) | Insurance Company |  | Policy Number | Telephone Number<br>( ) |

## FINANCIAL

### SAFE DEPOSIT BOX

### ATM

| Bank Name |  | Box Number     | Key Location | Bank Name |  | PIN Number         |  |
|-----------|--|----------------|--------------|-----------|--|--------------------|--|
| Bank Name |  | Account Number |              | Bank Name |  | Certificate Number |  |
| Bank Name |  | Account Number |              | Bank Name |  | Certificate Number |  |

### CHECKING ACCOUNT

### CERTIFICATES OF DEPOSIT

| Bank Name |  | Account Number |  | Bank Name |  | Certificate Number |  |
|-----------|--|----------------|--|-----------|--|--------------------|--|
| Bank Name |  | Account Number |  | Bank Name |  | Certificate Number |  |

### SAVINGS ACCOUNT

### MONEY MARKET ACCOUNT

| Bank Name |  | Account Number |  | Institution Name |  | Account Number |  |
|-----------|--|----------------|--|------------------|--|----------------|--|
| Bank Name |  | Account Number |  | Institution Name |  | Account Number |  |

## MUTUAL FUNDS

|           |        |                         |
|-----------|--------|-------------------------|
| Fund Name | Broker | Telephone Number<br>( ) |
| Fund Name | Broker | Telephone Number<br>( ) |
| Fund Name | Broker | Telephone Number<br>( ) |

## 401(k) / 403(b) PLANS

|              |                |                                       |
|--------------|----------------|---------------------------------------|
| Company Name | Account Number | Administrator Telephone Number<br>( ) |
| Company Name | Account Number | Administrator Telephone Number<br>( ) |

## ANNUITIES

|                   |                 |                         |
|-------------------|-----------------|-------------------------|
| Insurance Company | Contract Number | Telephone Number<br>( ) |
| Insurance Company | Contract Number | Telephone Number<br>( ) |

## IRAs

|            |                |                         |
|------------|----------------|-------------------------|
| Investment | Account Number | Telephone Number<br>( ) |
| Investment | Account Number | Telephone Number<br>( ) |
| Investment | Account Number | Telephone Number<br>( ) |
| Investment | Account Number | Telephone Number<br>( ) |

## BONDS

|        |                                |                |                         |
|--------|--------------------------------|----------------|-------------------------|
| Issuer | Maturity Date<br>Mo / Day / Yr | Account Number | Telephone Number<br>( ) |
| Issuer | Maturity Date<br>Mo / Day / Yr | Account Number | Telephone Number<br>( ) |

## PENSIONS

|         |               |                         |
|---------|---------------|-------------------------|
| Company | Administrator | Telephone Number<br>( ) |
| ID #    |               |                         |
| Company | Administrator | Telephone Number<br>( ) |
| ID #    |               |                         |

## STOCKS

|            |        |       |                       |        |                         |
|------------|--------|-------|-----------------------|--------|-------------------------|
| Investment | Shares | Price | Date Purchased<br>/ / | Broker | Telephone Number<br>( ) |
| Acct #     |        |       |                       |        |                         |
| Investment | Shares | Price | Date Purchased<br>/ / | Broker | Telephone Number<br>( ) |
| Acct #     |        |       |                       |        |                         |
| Investment | Shares | Price | Date Purchased<br>/ / | Broker | Telephone Number<br>( ) |
| Acct #     |        |       |                       |        |                         |
| Investment | Shares | Price | Date Purchased<br>/ / | Broker | Telephone Number<br>( ) |
| Acct #     |        |       |                       |        |                         |
| Investment | Shares | Price | Date Purchased<br>/ / | Broker | Telephone Number<br>( ) |
| Acct #     |        |       |                       |        |                         |
| Investment | Shares | Price | Date Purchased<br>/ / | Broker | Telephone Number<br>( ) |
| Acct #     |        |       |                       |        |                         |
| Investment | Shares | Price | Date Purchased<br>/ / | Broker | Telephone Number<br>( ) |
| Acct #     |        |       |                       |        |                         |
| Investment | Shares | Price | Date Purchased<br>/ / | Broker | Telephone Number<br>( ) |
| Acct #     |        |       |                       |        |                         |

## LOANS

|          |                |                         |
|----------|----------------|-------------------------|
| Lender   | Account Number | Telephone Number<br>( ) |
| Contact: |                |                         |
| Lender   | Account Number | Telephone Number<br>( ) |
| Contact: |                |                         |

## OTHER

|  |  |  |
|--|--|--|
|  |  |  |
|  |  |  |

## About . . . The Life Advice® Program

From time to time, we all benefit from some clear direction. That's why MetLife's Consumer Education Center developed an easy-to-use information resource program called **Life Advice**. And it's available at your fingertips—free.

The **Life Advice** program is about taking charge of the events in your life, and planning for others, so they don't take charge of you. Comprised of 35 brochures, the award-winning program is meant to support individuals through life's opportunities and challenges—the expected and the unexpected.

For more than 135 years, MetLife has reached out to individuals with information about issues that affect their health, property and financial well-being. The **Life Advice** program is a

progressive move to continue and enhance our public service commitment. We've partnered with a host of experts to bring you the **Life Advice** brochures so you can build your financial freedom and live a happier, healthier and more productive life.

We sincerely hope the information provided in our brochures helps you deal more effectively with the opportunities and challenges in your life and, in particular, with the important areas listed in the **DELIVERING THE PROMISE Organizer**.

*The MetLife Consumer Education Center*  
Metropolitan Life Insurance Company, 200 Park Avenue, New York, NY 10166  
www.metlife.com

### **INSURANCE (I)**

- Auto Insurance . . . . . LAI01
- Disability Insurance . . . . . LAI02
- Homeowner's Insurance . . . . . LAI03
- Life Insurance . . . . . LAI04
- Long Term Care . . . . . LAI05
- Protecting Your Purchases . . . . . LAI06

### **INVESTING (V)**

- 401(k) Plans . . . . . LAV01
- 403(b) Plans . . . . . LAV02
- Annuities . . . . . LAV03
- Financial Planning  
for College . . . . . LAV04
- Investing and Money Basics . . . . . LAV05
- IRAs . . . . . LAV06
- Mutual Funds . . . . . LAV07

### **MONEY MATTERS (M)**

- Building Financial Freedom . . . . . LAM01
- Being an Entrepreneur . . . . . LAM02
- Doing Your Taxes . . . . . LAM03
- Estate Planning . . . . . LAM04
- Helping Your Child  
Understand Money . . . . . LAM05
- Inheritance . . . . . LAM06
- Taking Legal Action . . . . . LAM07

### **HEALTH & LIFESTYLE (H)**

- Your Home . . . . . LAH01
- Retirement . . . . . LAH02
- Your Career . . . . . LAH03
- Being Healthy . . . . . LAH04
- Choosing a Dentist . . . . . LAH05
- Healthy Aging . . . . . LAH06

### **SAFETY & SECURITY (S)**

- Being a Victim of  
Identity Theft . . . . . LAS01
- Disaster Preparation . . . . . LAS02
- Fire Safety . . . . . LAS03
- Travel Safety . . . . . LAS04

### **FAMILY MATTERS (F)**

- Becoming a Parent . . . . . LAF01
- Caring For An Aging  
Loved One . . . . . LAF02
- Loss of a Loved One . . . . . LAF03
- Planning for Your  
Special Needs Child . . . . . LAF04
- When Your Child Gets a  
Driver's License . . . . . LAF05

### **ADDITIONAL MATERIALS**

- Directory . . . . . LAA01

To order up to three free brochures,  
call **1-800-METLIFE**  
(that's 1-800-638-5433).

You can also access **Life Advice®** on the  
Internet at [www.lifeadvice.com](http://www.lifeadvice.com).

**Life Advice®**

MetLife Consumer Education Center

## CREDIT CARDS

|      |          |        |                         |
|------|----------|--------|-------------------------|
| Card | EXP Date | Number | Telephone Number<br>( ) |
| Card | EXP Date | Number | Telephone Number<br>( ) |
| Card | EXP Date | Number | Telephone Number<br>( ) |
| Card | EXP Date | Number | Telephone Number<br>( ) |
| Card | EXP Date | Number | Telephone Number<br>( ) |
| Card | EXP Date | Number | Telephone Number<br>( ) |
| Card | EXP Date | Number | Telephone Number<br>( ) |

## FREQUENT FLYER CLUBS

|         |           |                         |
|---------|-----------|-------------------------|
| Airline | FF Number | Telephone Number<br>( ) |
| Airline | FF Number | Telephone Number<br>( ) |
| Airline | FF Number | Telephone Number<br>( ) |

## OTHER CLUBS / ORGANIZATIONS

|      |           |                         |
|------|-----------|-------------------------|
| Club | ID Number | Telephone Number<br>( ) |
| Club | ID Number | Telephone Number<br>( ) |
| Club | ID Number | Telephone Number<br>( ) |
| Club | ID Number | Telephone Number<br>( ) |
| Club | ID Number | Telephone Number<br>( ) |

## MILITARY

|                |               |                                 |
|----------------|---------------|---------------------------------|
| Service Branch | Serial Number | Discharge Date<br>Mo / Day / Yr |
|----------------|---------------|---------------------------------|

## FUNERAL ARRANGEMENTS

|   |                    |
|---|--------------------|
| Funeral Home  | Location           |
| Funeral Service   | Location           |
| Type of Burial<br><input type="checkbox"/> Lot # _____ <input type="checkbox"/> Internment <input type="checkbox"/> Cremation | Location & Contact |

## IN THE FUTURE

Soon after the funeral or memorial service is over, you also may be asked to finalize the financial affairs of the deceased. Depending upon the size and type of estate, this can be a complex—and sometimes expensive—process. For example, you may be involved in the probate process, which determines the authenticity of your loved one's will. If there is no valid will, the property will be passed on to heirs according to state law.

You may have to address many other important issues. If you can afford it, it is probably wise to consult a lawyer or at least find a comprehensive reference book to help you out. To get you started, however, you can refer to this short list of things to do.

- Contact the Social Security Administration (800/772-1213) regarding any benefits the deceased may have been receiving and any benefits that you may be eligible for.
- Notify your loved one's insurance company. Ask for claim forms and instructions on how to file for life insurance proceeds.
- Notify your loved one's employer. You or other family members may be entitled to benefits.
- Submit outstanding medical claims to the proper insurer.
- Notify banks at which the deceased had accounts.
- Notify creditors.
- Determine what taxes are due and file final tax returns.
- If the deceased served in, or was retired from, the uniformed services, the spouse and any minor children may be eligible for certain benefits. For information, contact the nearest Department of Veterans Affairs (or call 800/827-1000), Military Casualty Assistance or Civil Service offices.