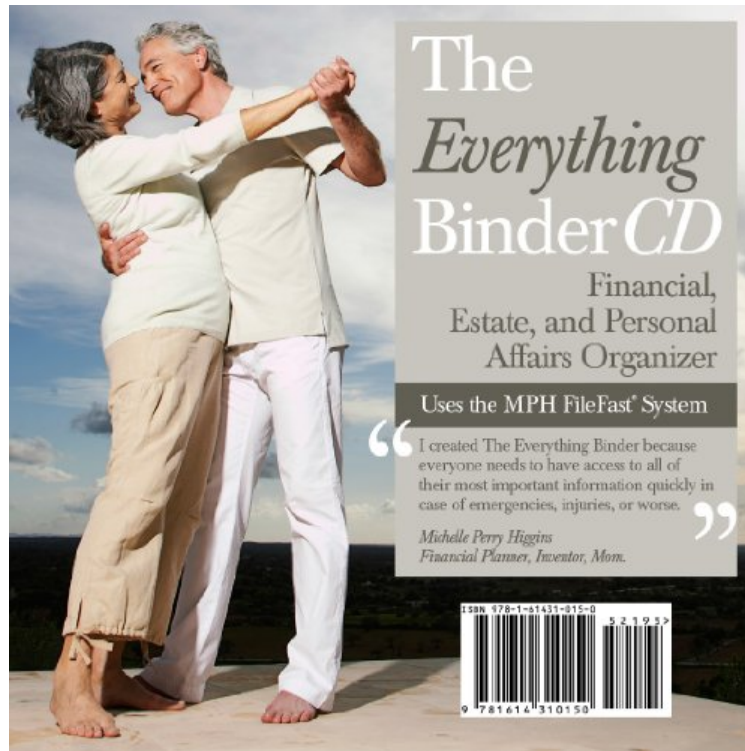


[FREE] The Everything Binder CD - Financial, Estate and Personal Affairs Organizer

The Everything Binder CD - Financial, Estate and Personal Affairs Organizer

Michelle Perry Higgins

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Michelle Perry Higgins : The Everything Binder CD - Financial, Estate and Personal Affairs Organizer before purchasing it in order to gauge whether or not it would be worth my time, and all praised The Everything Binder CD - Financial, Estate and Personal Affairs Organizer:

0 of 1 people found the following review helpful. a must for every adult...By Jelayne UnderwoodOMGosh... I love it! I may have been able to find out the same info using google, but I love having it at my finger tips. On my first flip though the cd / pdf file I noticed that I had a lot of info my family would need if I or my husband died but they would have a hard time finding it. So I am in the process of chasing down some papers and printing off other stuff. The last 2 pages were something I never would have thought of, but i will be using for sure.2 of 2 people found the following review helpful. A comprehensive financial, estate, and personal organizerBy J. ChambersNOTE: I also reviewed the printed binder version of The Everything Binder, which included the CD-ROM. This review is for the CD-ROM version.A few months ago, when my wife and I bought prepaid cremation services, the sales representative gave us a folder for recording personal information, wills, several types of checklists, contact information, finances, and other things that would be essential for the surviving spouse when one of us dies or is incapacitated, or for our designated contact if we died together. It's not pleasant to think about these things, but failure to record this kind of information would place an undue hardship on survivors, so it needs to be done and updated when changes occur.That's essentially the purpose of The Everything Binder, but the binder is far more comprehensive than the folder we received. The binder includes the obvious things, of course, such as medical history, insurance policies, investment accounts, real

estate, debts, estate planning, and funeral arrangements, but it also covers some things that many people might overlook, like log-in information for personal devices and online accounts, obituary, and even directives about pets. I know from personal experience that having this information readily available when loved ones pass away is far less stressful on the survivors. The real highlight of the binder is the included CD-ROM. On the CD is a single PDF file (22MB) that's open for recording the same information that the printed binder holds. Since the file can be written to, it's very easy to revise the information, and if desired, the file can be emailed to other parties who you want to have it. The file can also be printed for ready reference. I haven't seen any other similar product on the market that's as comprehensive and flexible as The Everything Binder. It's an ideal way to record and update personal information for your own reference and to help others handle your affairs in case of your death or incapacitation. A review copy of the CD-ROM was provided by the author. 0 of 0 people found the following review helpful. Great gift of preparation for those you love. By Leigh Said Much of life seems to be reactionary, we make no advance plans for emergencies or other crises that occur when we least expect it. Mrs. Higgins has put together an excellent resource to help plan for the worst: the death of a loved one. Although there are other applications to the content found in this CD-ROM, that is its ultimate purpose. I wish I had it before my mother died, I'm sure she would have, too, because the business of death worried her greatly. I really like that the forms are printable from the CD. They are easy to follow and understand. They give you the tools you need when you find yourself dealing with the unimaginable. I highly recommend this CD-ROM for married couples, single people with children and estates. The things you learn here will help you and your family as they struggle through their most difficult moments.

From letting your family know your wishes, to having everything ready to go in an emergency - The Everything Binder Full version has everything you need. Our Electronic Version contains an Electronic Version of the worksheets from The Everything Binder. Does not include binder, printed pages, tabs or 5 Clear Sheets. The CD contains easy to fill out PDF [so you can save a digital version if you wish. Supports PC but unfortunately not MAC at this time. Includes everything you need to document: -Personal Information -Immediate Contacts -Pre Post-Death Checklists - Medical History -Important Contacts -Insurance -Private Security Access Information -Income Cash Equivalents -Pet Information -Funeral Arrangements -Document Originals Copies -Estate Planning Documents -Letters to Loved Ones - Real Estate -Personal Property -Retirement Investments -Debt -Business Ownership

About the Author As a financial planner and principal of California Financial Advisors in San Ramon, California, Michelle Perry Higgins specializes in wealth management. Over the past 17 years she has built a successful practice advising executive professionals into retirement, and her passion for finance has helped hundreds of individuals better understand the process of investing and fiscal planning. Ms. Higgins was featured as a 2012 and 2013 Five Star Wealth Manager Award, Diablo Magazine, and was also ranked in the Top 50 Women-Owned RIAs in 2013, Top 25 Women RIAs 2012 and Top 40 Under 40 by WealthManagement.com. She has been quoted in Yahoo! Finance, MSN Money and The Los Angeles Times, is a contributor to Examiner.com and is a Wall Street Journal Expert Panelist. Ms. Higgins is a frequent public speaker on retirement planning, investments, wealth management, college education funding, estate planning and insurance. She is also proud to mentor college students interested in entering the financial planning profession. Ms. Higgins second publication is a book entitled Stocks, Bonds and Soccer Moms; Seven Steps to a Balanced Life and will debut in early 2014.