

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

Michelle Perry Higgins

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**Michelle Perry Higgins : The Everything Binder - 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 - Financial, Estate and Personal Affairs Organizer:

3 of 3 people found the following review helpful. This is the best thought out and presented Book of its kind I have ever seen. By C. Wilson I am in the finance business. This is the BEST tool for anyone who thinks they will die and want to be sure their affairs are handled...or anyone who thinks they might be disabled and want the person responsible to know what they are doing. So, that means everyone. The CD is worth the price alone. I used the CD and didn't even use the book. You pop the CD into your computer. Then, you write on the appropriate pages, save the work to your hard drive and print a hard copy if you like. Just follow the book and it will coach you through everything you need to do. You fill it out as you go. So simple and clear. 0 of 0 people found the following review helpful. Exactly what I've

been looking for. By Joseph Miduski I found the Everything Binder to be an excellent package. It covers everything I wanted to get organized pertaining to my personal affairs and Estate. Not only for now but in case I should pass on. All my assets, Will information, banking accounts, Stocks, IRA, Pass words to access all my accounts and people to contact are all organized and in order. Funeral and burial information is covered. All this and more. It covers topics I don't have need of but I'm sure there is some that do that have more complex lives and assets. The CD that comes with this package makes updating your information fast and simple. The binder that comes with it organizes all this information in a way that anyone can locate and finalize all your affairs as you describe in the folder without spending weeks looking for what you have and who to contact. Its all there. It will take me longer to find my stuff than it will for my children to resolve my affairs. It's a good price for all you get. I love it. 0 of 0 people found the following review helpful. It's okay, not my favorite solution. By Paracord Guy I really like this system. It makes you think and organize yourself, but I do find it hard to keep updated. I'm not sure I would buy it again because most of these templates can be downloaded over the internet for cheap or free from other sources. If you are the kind of person that wants a quick and fast solution to organizing your life, this is a great product. For me, I would not purchase this product again unless there were a way to document everything electronically.

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 Full Version contains ready to complete printed pages, 17 tabs, a CD with easy to fill out PDF [so you can save a digital version if you wish] Supports PC but unfortunately not MAC at this time, and five plastic document savers, all in a handy three-ring binder. 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-Five Document Savers

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.