

The Everything Binder - Lite: Financial, Estate and Personal Affairs Organizer

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

3 of 3 people found the following review helpful. The name says it all -- what a great concept! By Melissa Ricks This binder is a great tool for storing all of your important information in one, easy-to-find place. You only need to complete the sections that are relevant for your situation. In the event of an emergency, having this information handy will make it easier for your loved ones. 3 of 3 people found the following review helpful. Perfect solutions By Edward Rios Perfect solutions for those many questions you have about what would happen and you love ones needed to know. This also makes a perfect gift for your love ones. 3 of 3 people found the following review helpful. Very user friendly! By Tmp12 Love this binder! The CD is very easy to use and the binder now holds all my family's important documents all in one location. It's a must for every family.

From letting your family know your wishes, to having everything ready to go in an emergency - The Everything Binder has everything you need. The Everything Binder Lite contains 17 tabs, the CD and plastic document savers all in a handy three-ring binder. No printed pages are included in this version, but we have made it easy to fill out the PDF on the CD. Supports PC but unfortunately not MAC at this time Just print out the pages when you re done, three-hole punch them, place them in your binder and you re good to go!The Lite version includes: An Everything Binder with full set of tabs and a CD-based PDF that contains: 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 Plastic Sheet Savers

About the AuthorAbout Michelle As a financial planner and principal of California Financial Advisors in San Ramon, California, Michelle Perry Higgins specializes in wealth management. Since 1996 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 works with many ATT and Chevron managers/executives and has extensive knowledge with their benefit plans. Ms. Higgins was ranked in the Top 50 Women-Owned RIAs in 2013, Top 25 Women RIAs in 2012 and 2014, and Top 40 Under 40 by WealthManagement.com. Also, she was awarded the 2012, 2013 and 2014 Five Star Wealth Manager Award, Diablo Magazine. She has appeared on CNBC and CBS, quoted in Yahoo! Finance, MSN Money, The Los Angeles Times, 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. In addition, she has published two books: The Everything Binder: Financial, Estate and Personal Affairs Organizer and Stocks, Bonds Soccer Moms: 7 Steps to a Balanced Life. Ms. Higgins graduated from St. Mary's College with a concentration in business administration and economics. Currently, she is on the Saint Mary s College Women's Leadership Council as it is her passion to give back by mentoring young women and helping to raise scholarship funds. Ms. Higgins enjoys spending time with her husband and their two daughters. Join Michelle: Twitter: @RetirementMPH Facebook: facebook.com/MichellePerryHiggins YouTube: youtube.com/user/Mperryhiggins Pinterest: pinterest.com/mperryhiggins Website: MichellePerryHiggins.com