

**CALIFORNIA**

**ORGANIZING YOUR PERSONAL  
ASSETS PACKAGE**

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U.S. Legal Forms™ thanks you for your purchase of an Organizing your Personal Assets Package. This package is an important tool to help you organize your personal and financial affairs and be well prepared in the event of an emergency. It contains helpful budgeting tools and key legal documents that are vital for you to maintain on file and safeguard in event of an emergency or unforeseen life event.

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### **I. FORM LIST**

With this Organizing your Personal Assets Package, you will find the state specific forms that are necessary to organize your personal and financial affairs and achieve your financial goals. This package contains forms that are essential for analyzing your budget and planning for your spending and savings needs. Forms included also allow you to organize your important documents, ensure accurate record-keeping, and minimize time and expense involved in dealing with emergency situations.

Included in your package are the following forms:

- 1. Cash Flow Statement
- 2. Retirement Cash Flow
- 3. Personal Monthly Budget Worksheet
- 4. Personal Property Inventory
- 5. Personal Planning Information and Document Inventory  
Worksheets - A Legal Life Document
- 6. General Durable Power of Attorney for Property and  
Finances Effective upon Disability
- 7. Sample Letter for Request for Credit Report

## II. DESCRIPTIONS OF FORMS

Brief descriptions of the forms contained in your U.S. Legal Forms™ Organizing your Personal Assets Package are found below.

Personal Monthly Budget Worksheet - This Excel spreadsheet allows you to enter amounts into itemized categories for income and expenses. The worksheet will automatically calculate monthly totals for income and expenses, as well as any money remaining after all expenses are paid. A helpful tool for planning and organizing your financial affairs. Adapt to your needs.

Personal Property Inventory - This Personal Property Inventory form provides a central place for an individual or family to itemize all the personal property that is owned and kept in a home. This form is beneficial for keeping accurate records for insurance companies or estate planners.

Personal Planning Information and Document Inventory Worksheets - A Legal Life Document - This form enables you to document matters relevant to your life and personal planning such as the location of your important legal documents, relatives names, contact information, medical information, financial asset inventory and more.

Cash Flow Statement - This cash flow statement shows incoming and outgoing income and expenses of a typical household. Good for budgeting purposes. Adapt to your needs.

Retirement Cash Flow - This form allows retired persons to determine their available funds for savings and investments for themselves and a spouse based upon itemized retirement income, taxes, and living expenses.

General Durable Power of Attorney for Property and Finances Effective upon Disability - This General Durable Power of Attorney for Property and Finances Effective upon Disability form is a general, durable power of attorney which is effective ONLY upon the principal's disability, incompetency or incapacity. You can use this form to appoint an attorney-in-fact (agent) to make decisions regarding property, financial, management, banking, business and other matters for you. The powers granted to an Agent in this Power of Attorney are very broad, but do NOT provide for health care services.

Sample Letter for Request for Credit Report – Use this form to request a free annual credit report from the major credit reporting agencies. You may also request that your social security number be blocked to display only the last four digits.

If you need additional information, please visit [www.uslegalforms.com](http://www.uslegalforms.com) and look up forms by subject matter. You may also wish to visit our legal definitions page at <http://definitions.uslegal.com/>

## III. LEGAL DOCUMENT STORAGE

Once you prepare legal documents and forms in your U.S. Legal Forms™ Organizing your Personal Assets Package, it is highly recommended that you keep forms together. An optional

USLegal Life Documents Organizer – small or large size is available for purchase from [www.uslegalforms.com](http://www.uslegalforms.com) to help store your legal documents.

Legal documents should also be kept in a very secure place such as a bank safe deposit box or personal home safe. You may wish to tell your attorney or a family member about the location of your Legal Life Documents Package in the event you are unable to communicate it to them when needed.

#### **IV. TIPS ON COMPLETING THE FORMS**

The form(s) in this packet may contain “form fields” created using Microsoft Word or Adobe Acrobat (“.pdf” format). “Form fields” facilitate completion of the forms using your computer. They do not limit your ability to print the form “in blank” and complete with a typewriter or by hand.

It is also helpful to be able to see the location of the form fields. Go to the View menu, click on Toolbars, and then select Forms. This will open the Forms toolbar. Look for the button on the Forms toolbar that resembles a shaded letter “a”. Click this button and the form fields will be visible.

By clicking on the appropriate form field, you will be able to enter the needed information. In some instances, the form field and the line will disappear after information is entered. In other cases, it will not. The form was created to function in this manner.

#### **V. DISCLAIMER**

These materials were developed by U.S. Legal Forms, Inc. based upon statutes and forms for the subject state. All information and Forms are subject to this Disclaimer:

**All forms in this package are provided without any warranty, express or implied, as to their legal effect and completeness. Please use at your own risk. If you have a serious legal problem, we suggest that you consult an attorney in your state. U.S. Legal Forms, Inc. does not provide legal advice. The products offered by U.S. Legal Forms (USLF) are not a substitute for the advice of an attorney.**

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