MINNESOTA

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. Special Durable Power of Attorney for Bank Account Matters
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.

Net Worth and Financial Calculator Worksheets - The Excel spreadsheet contains two worksheets. One allows you to enter amounts into itemized assets and liabilities, and will automatically total your assets, liabilities and net worth. The other worksheet contains financial calculators for planning payments to savings, annuities, loans/mortgages, and more, in order to help you reach your financial goals. A helpful tool for budgeting and financial planning.

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 owed 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.

Special Durable Power of Attorney for Bank Account Matters - This special or limited power of attorney is for your agent to handle bank account matters for you, including, making deposits, writing checks, opening accounts, etc. A limited power of attorney allows the principal to give only specific powers to the agent. The limited power of attorney is used to allow the agent to handle specific matters when the principal is unavailable or unable to do so.

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 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 to help store you 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:

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