

Take Charge

Getting Your Financial Life In Order



Do you know where your critical documents are located? If a death in the family occurred, would you know where to find the will, bank documents, insurance policies and investment statements? Would you even know whom to contact to get the documents you need?

Are you in document disarray?

Whether you are changing jobs, buying a home, caring for an aging loved one, experiencing a death in the family or planning your retirement, major life events can send you into a document search tailspin.

Just think about how many documents the bank requests when you apply for a home mortgage or the litany of current and historical documents that are needed to settle an estate. Because we don't always tend to keep track of everything we have or might need to prepare for such events, unexpected circumstances send most of us scurrying to collect what's required.

A simple way to get started

If the idea of getting your financial life in order sounds completely overwhelming, don't fret. New York Life's LifeFolio System can help. Available free of charge from Agent Philip P. Nguyen with New York Life Insurance Company, LifeFolio features an easy-to-complete checklist that can help you and your family to organize all your critical financial documents so they'll be accessible when you need them.

Being organized identifies what you have and helps your financial professional to review what you need to bridge any gaps in your financial strategy. When you think about it, organizing your financial life may be one of the most important gifts you'll ever give yourself and your family.

This educational article is provided as a courtesy by Philip P. Nguyen, Agent, (CA Ins. Lic. #0H39848) New York Life Insurance Company.

To learn more about the information or topics discussed, please contact Philip P. Nguyen at **408.892.7023**.