

For the Record

WHAT YOUR LOVED ONES NEED TO KNOW WHEN YOU CAN'T TELL THEM



Estate PLANNING Essentials

Will & Trust:

Will Documents, Trust Documents, Power of Attorney

Letters of Instruction:

List of Friends & Family Advisors to call immediately

Personal Letters to:

Children

List of all Passwords - *Especially:*

Phone, Computer, Financial Accounts

Identity Documents - *Copy of:*

Birth Certificate, Social Security Card, Credit Cards



Proof OF Ownership

Deeds:

Real Estate, Land, Cemetery

Mortgage:

Mortgage Information

Proof of:

Loans Made, Debts Owed

Cars, Etc:

Vehicle Titles

Investments:

Brokerage accounts, Stock Certificates, Savings Bonds

Operating Agreements:

Business Partnerships, Corporate

Tax Documents:

Returns for past 2-4 years



Bank ACCOUNTS

List of Bank Accounts - *Including:*

How they are titled:
Joint, Trust etc

List of all Bank Logins:

Username, Passwords

List of Safe Deposits:

Boxes & Keys



Medical

Medical History:

Personal, Family, Pet/Vet Information, Digital access (Usernames and passwords)

Living Will *or* Advanced Health Care Directive:

Health Care Power of Attorney, Designation of Medical Representative, Do-Not-Resuscitate Order



Insurance & Retirement

Insurance Policies & Contracts:

Life, Long Term Care, Disability, Property

Account & Beneficiary information:

IRA, Roth IRA, 401(K), Life Insurance

Annuities:

Annuity Contracts



Relationships

Matrimony:

Marriage License

Divorce:

Divorce paperwork

Adoption:

Adoption Paperwork

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