

25 ESTATE DOCUMENTS YOU NEED TO PUT IN ONE PLACE*

The Essentials

- ◇ Will
- ◇ Letter of Instruction
- ◇ Trust Documents
- ◇ Financial Power of Attorney (POA)

Marriage and Divorce

- ◇ Marriage License
- ◇ Divorce Papers
- ◇ Military Documents (DD214)

Health Care Confidential

- ◇ Personal and Family Medical History
- ◇ Durable Health Care Power of Attorney
- ◇ Authorization to Release Health Care Information
- ◇ Living Will/Advanced Directive/POLST

Proof of Ownership

- ◇ Housing, Land and Cemetery Deeds
- ◇ Escrow Mortgage Accounts
- ◇ Proof of Loans Made and Debts Owed
- ◇ Vehicle Titles
- ◇ Stock Certificates, Savings Bonds and Brokerage Accounts
- ◇ Partnership and Corporate Operating Agreements
- ◇ Tax Returns

Life Insurance and Retirement

- ◇ Life Insurance Policies
- ◇ Individual Retirement Accounts
- ◇ 401(k) Accounts
- ◇ Pension Documents
- ◇ Annuity Contracts

Bank Accounts/Social Media

- ◇ List of Bank Accounts
- ◇ List of all User Names and Passwords
- ◇ List of Safe Deposit Boxes

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