

# 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

- Personals and Family Medical History
- Durable Health-Care Power of Attorney
- Authorization to Release Health-Care Information
- Living Will
- Do-Not-Resuscitate Order

## 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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\*From Saabira Chaudhuri's 7/2/11 article in the *Wall Street Journal* as referenced by PlannedGiving.Com.

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