25 Estate Documents You Need to Put in One Place*

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

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

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

Bank Accounts/Social Media
- List of Bank Accounts
- List of all User Names and Passwords
- List of Safe-Deposit Boxes

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

For more information contact:

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