

Important Estate Documents

This is a simple list of what type of documents should be kept in one consolidated place for estate purposes.

The Essentials

- Will
- Letter of Instruction
- Trust Documents
- Financial Power of Attorney (POA)
- 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
- Do-Not -Resuscitate Order

Life Insurance & Retirement

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

Bank Accounts / Social Media

- List of all bank accounts
- Individual brokerage accounts
- List of Safe-Deposit boxes
- List of all User names and passwords for various accounts

Proof of Ownership

- Housing, Land and Cemetery Deeds
- Escrow Mortgage accounts
- Proof of loans made and debts owed
- Vehicle titles
- Stock certificates & Savings Bonds
- Partnership & Corporate Operating Agreements
- Tax returns

Gleanings for the Hungry

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