

The **24** *Essential* Estate Documents

Checklist



Bank Accounts

- List of bank accounts
- List of all user names and passwords
- List of safe-deposit boxes

Life Insurance and Retirement

- Life-insurance policies
- IRA, 401 (k) and retirement accounts
- Pension documents
- Annuity contracts

Health Care

- 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
- Stock certificates, savings bonds and brokerage accounts
- Partnership and corporate operating agreements
- Tax returns

Marriage and Divorce

- Marriage license
- Divorce papers

Legal

- Attorney contract information
- Financial advisor contact information

The Essentials

- Will
- Letter of instruction
- Trust documents

