

30 Estate Documents

You Need to File in One Place *

The Essentials

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

Health Care

- 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 and Retirement

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

Proof of Ownership

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

Marriage and Divorce

- Marriage License
- Divorce Papers

Bank Account/Social Media

- List of Bank Accounts
- List of all Usernames and Passwords
- List of Safe Deposit Boxes

Other

- Social Security
- Birth Certificate
- Military Documents (DD214)
- Funeral Arrangement Information



*From Saabira Chaudhurl's 7/2/11
Wall Street Journal article