

30 Essential Estate Documents

Checklist *

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