A CHECKLIST OF IMPORTANT FAMILY DOCUMENTS

It is important to locate, list, and review your documentation so that, in the event of your disability or death, your agent will be able to administer your estate according to your wishes.

The following is a starting place, a generalized list of documents and information needed to administer an estate. A list of document locations and information should be given to your attorney, executor and any other potentially responsible person. The documents themselves should reside in a secure location.

- **Name and Phone Number of Attorney, Accountant, Financial Advisor**

PERSONAL DOCUMENTS

- Birth Certificates
- Adoption Papers
- Citzenship/Naturalization Papers
- Military Discharge Papers
- Last Will and Testament
- Trust Documents
- Burial Instructions (pre-paid services, plots, etc.)
- Safe Deposit Boxes and/or Safes (with keys and/or combinations)
- Powers of Attorney

FINANCIAL ACCOUNTS

- Bank/Credit Union Accounts (Checking, Savings)
- Retirement Accounts
- Brokerage Accounts
- Pension System Statements
- Deferred Compensation Papers
- Credit Card Accounts
- U.S. Savings Bonds
- Money Market Accounts
- Certificates of Deposit (CDs)
- Stock Certificates/Bonds

FINANCIAL PAPERS

- Real Estate Deeds
- Mortgage Documents
- Property Tax Records
- Inventory of Assets (include appraisal)
- Vehicle Titles
- Income Tax Returns for Several Years
- Rental/Lease Agreements
- Partnership Agreements
- Outstanding Loans (either owed to you or by you)
- Pending Legal Actions/Lawsuits

MEDICAL AND INSURANCE INFORMATION

- Health Care Provider and Personal ID Number
- Organ Donor Information
- Living Will/Health Care Proxy
- Long Term Care Policy Information
- Life Insurance Policy Documents
- Veterans Administration Insurance Policy
- Mortgage Insurance Policy
- Property and Casualty Policies