



25 Estate Documents You Need to Put in One Place

The Essentials

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

Marriage and Divorce

- Marriage License
- Divorce Papers
- Military Documents (DD214)

Health-Care Confidential

- Personals and Family Medical History
- Durable Health Care Power of Attorney
- Authorization to Release Health Care Information
- Living Will
- Do-Not-Resuscitate Order

Bank Accounts/Social Media

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

Proof of Ownership

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

Life Insurance and Retirement

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