

Estate Planning Records Checklist

Will—location of original and plan for access by named executor(s)

Trust(s)—location of original of any trust agreement and plan for access by successor trustee(s)

Ancillary Estate Planning Documents—location of originals and plan for access to Statutory Durable Power of Attorney, Directive to Physicians and Family or Surrogates, Medical Power of Attorney, HIPAA Authorization, Declaration of Guardian for Self, Declaration of Guardian for Minor Children (if any), Appointment of Agent to Control Disposition of Remains (if applicable), DNR Order (if applicable), Organ Donor record (if applicable), and Marital Property Agreement (if any).

Real Estate—address and copy of deed for each residence and any other real estate

Oil and Gas Interests—location and copy of deed and any division orders for each oil and gas interest

Stocks and Bonds—written record of account styling and name of financial planner and institution holding account(s)

Cash—written record of account styling and name of each institution holding cash account(s)

Mortgages and Notes—copy of any notes or other loan documents made payable to you

Closely Held Business Interests—contact person other than you with access to records of business, such as corporate books or partnership records

Personal Effects—copy of insurance for any valuable, insured items

Vehicles and Boats—original title(s)

Pet(s)—description and plan for care at your death or incapacity

Life Insurance—copy of each policy and written confirmation of each named beneficiary

Annuities—copy of each policy and written confirmation of each named beneficiary

Pension Benefits, IRAs, etc.—Name of each institution holding a pension, IRA, or other retirement account and copy of each beneficiary designation on file with provider(s)

Safe Deposit Box—location and written confirmation of person(s) authorized to access

Income Tax Records—for recent and current years

Contact Data—Person(s) to notify in case of death or incapacity; agents appointed in ancillary estate planning documents; executors, trustees, and beneficiaries named in Will and any Trust; beneficiaries of life insurance, annuities, pensions, IRAs, etc.

Documentation of Debts Owed—mortgages, car notes, credit cards, monthly utilities, etc.

Passwords—on-line accounts and other password protected assets