



A Checklist of Estate Planning Items to Keep 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

- ☐ Personal and Family Medical History
- ☐ Durable Health Care Power of Attorney
- ☐ Authorization to Release Health Care Information (HIPAA)
- ☐ Living Will
- ☐ Do-Not-Resuscitate

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) and 403 (b) Accounts
- ☐ Pension Documents
- ☐ Annuity Contracts
- ☐ Bank Accounts/Social Media
- ☐ List of Bank Accounts
- ☐ List of all Usernames and Passwords
- ☐ List of Safe-Deposit Boxes