

41 Estate Documents to Put in One Place

"This is what the LORD says: 'Put your house in order...' –Isaiah 38:1



The Essentials

- Will with Child Guardianship Papers
- Letter of Instruction
- Trust Documents
- Financial Power of Attorney (POA)



Marriage & Military

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



Life Insurance & Retirement

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



Health Care

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



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



Digital Assets: Names & Passwords

- Social Media / Blogs
- Electronic Devices
- E-Mail
- Domains
- Financial Software and Institutions
- Insurance
- Medical Records
- Credit Cards
- Debts
- Utilities
- Digital Media Accounts
- On-Line Stores
- Loyalty Programs
- Cloud Storage
- Location of Physical Backup



Bank Accounts

- List of Bank Accounts
- List of Safe-Deposit Boxes

Adapted from Saabira Chaudhuri's 7/2/2011 article in the *Wall Street Journal* and *Digital Estate Information* by Gerry W. Beyer