

Contents of your *Estate Information* packet

Although you have knowledge about all of these items already, it could be extremely difficult for someone else to gather these facts. If you have one master document containing all the following information, it will save your loved ones many, many hours of anxiety and work.

Print and use this check-off list as a guide or template. Type your own information into a computer Word document, or write it out by hand. It doesn't matter how you do it. The important thing is that you get it done.

Date that this Estate Information packet was last updated

Your full legal name

Date of birth, location

Your address, phone numbers

Social security number

Parents names; mother's maiden name

Spouse and children names, birthdates, addresses, phone numbers

Executor

- o Name, address, phone number

Accountants

- o Names, addresses, phone numbers
- o Description of services used

Attorneys

- o Names, addresses, phone numbers
- o Description of services used
- o List of important documents drawn by attorney
- o List of original documents that are in their possession

Last Will and Testament

- o Location of original document
- o Location of copies
- o Preparer of document
- o Date the latest version was signed
- o Details about any addendums

Living Will

- o Location of original document
- o Location of copies
- o Preparer of document
- o Date the latest version was signed
- o Brief summary of important document details

Power of Attorney

- o Location of original document
- o Location of copies
- o Preparer of document
- o Date the latest version was signed
- o Brief summary of important document details

- Type - general, durable, financial

Term Life Insurance policies

- Insurance company name, phone number
- Insurance agent name, phone number
- Policy account number
- Policy value
- Location of original policy papers
- Name of benefactor

Annuity Insurance policies

- Insurance company name, phone number
- Insurance agent name, phone number
- Policy account number
- Short description of policy details -- values, purchase date, face value
- Location of original policy papers
- Name of benefactor

Disability Insurance policies

- Insurance company name, phone number
- Insurance agent name, phone number
- Policy account number
- Short description of policy details -- waiting period, monthly benefits, term of policy
- Location of original policy papers

Long-term Care Insurance

- Insurance company name, phone number
- Insurance agent name, phone number
- Policy account number
- Short description of policy details
- Location of original policy papers

Medical Insurance

- Company name, phone number
- Insurance agent name, phone number
- Group number, policy number
- Location of original policy papers

Supplemental Medical Insurance

- Company name, phone number
- Insurance agent name, phone number
- Policy number
- Location of original policy papers

Homeowners Insurance

- Insurance company name, phone number
- Insurance agent name, phone number
- Policy account number
- Location of original policy papers

Automobile Insurance

- Insurance company name, phone number
- Insurance agent name, phone number

- Policy account number
- Location of original policy papers

Umbrella Insurance

- Insurance company name, phone number
- Insurance agent name, phone number
- Policy account number
- Location of original policy papers

Business Insurances

- Insurance company name, phone number
- Insurance agent name, phone number
- Policy account number
- Location of original policy papers

Checking and Savings Accounts

- Bank name, branch name, address, phone number
- Account numbers
- Account types
- Date account was opened
- Names on each account
- Location of bank statements, blank checks

Investment Accounts

- Name of financial institution
- Broker name, address, phone number
- Account numbers
- Account types
- Date accounts opened
- Location of account paperwork
- Location of monthly statements
- Brief description of account, and it's use

Credit Cards

- Issuing bank name, phone number
- Account numbers
- Names on accounts
- Location of monthly statements

Home Mortgage

- Current mortgage company (where payments go) name, address, phone number
- Account number
- Exact name on account
- Location of paperwork for financing loan
- Location of paperwork for monthly payments

Home Ownership

- Location of deed, title, mortgage satisfaction proof
- How home is titled (sole ownership, joint tenancy, jtwros, tenancy in common, etc)
- Exact name on title or deed
- Property tax information

Loans

- Lending institution name, address, phone number
- Account numbers
- Exact names on account
- Location of paperwork
- Brief description of each loan -- original date, amount, terms

Credit Lines

- Lending institution name, address, phone number
- Account numbers
- Exact names on account
- Location of paperwork

Businesses

- Location of businesses
- Contact information for key partners or employees
- Contact information for accountant
- Location of important business paperwork
- Name of trusted person to oversee or advise business operations during any transition
- Your desires on what to do with the business

Real Estate

- List of real estate holdings and rental properties
- Location of records
- Names of any brokers, partners, corporations, and other important contacts

Tax Returns

- Location of past tax returns
- Name of tax return preparer

Safe Deposit Box

- Name of institution, address, phone number
- Location of key
- Names of authorized co-signers
- Description of exactly what is stored in the box, including list of important documents

Safe

- Location of safe
- Description of exactly what is stored in the box, including list of important documents
- How to access contents
- List of people who know how to access contents

Automobiles

- Location of original title
- Exact name(s) on title
- Location of maintenance paperwork
- Location of registration

Physicians

- Names, addresses, phone numbers

- Brief description of services utilized

Computers

- Description of any important documents or information that might be on each computer
- Logon names and passwords, or where password list is kept
- List of who has access to each computer
- List computers that contain family or personal photographs
- Locations of any back-up disks, tapes
- List computers that contain sensitive information that you wouldn't want "undeleted" and read if computer is given to anyone else

Creditors and Liabilities

- List everyone to whom you might owe money
 - Utility companies - electricity, gas, water, sewer, garbage
 - Cable television
 - Internet
 - Credit cards
 - Home mortgage
 - Commercial Loans
 - Loans from family or friends
 - Lines of credit
 - Physician, dentist, other health care providers
 - Insurance companies

Marriages, Divorces

- Names of current and past spouse(s)
- Dates of marriage
- Dates of divorce
- Location of marriage certificate
- Location of divorce records

Citizenship

- Location of citizenship records
- Location of naturalization records
- Brief summary of citizenship history

Adoption

- Location of adoption records
- Brief summary of adoption

Military Service

- Location of military records, including discharge papers
- Brief description of service
- Brief description of any ongoing benefits
- Ranks, awards

Veteran's Benefits

- Location of VA records

Social Security, Medicare

- Location of Social Security and Medicare records
- Social security number
- Exact name on the Social Security account

- o Location and phone number of local Social Security service office

Pension Plan

- o Location of pension plan records
- o Brief description of benefits

Birth Certificate

- o Location of original birth certificate
- o Exact name on birth certificate

Names

- o List of all prior names, legal or otherwise
- o Any other nicknames you have gone by, or might be on any documents or legal papers
- o Prior names from marriages
- o Dates of any name changes
- o Name changes of children

Voters Registration

- o Location of card
- o Local voter's registration office, phone number

Passport

- o Location of current passport

Memberships

- o List of unions, book and record clubs, service organizations, fraternal organizations, professional groups, boards
- o Contact names and phone numbers

Miscellaneous Numbers

- o Professional organizations, phone numbers, membership numbers
- o Retail store memberships, phone numbers, membership numbers
- o Tax ID numbers
- o AARP
- o AAA

List of Family Heirlooms

- o Description and history of each item
- o Your desires on what should happen to each item

List of people who should be notified upon death

Religious contacts

- o Names, phone numbers

Desires for care of pets

Desires for guardians for your children

Funeral and Burial—*consider storing a copy of this section with your Last Will and Testament, or in a location where it will be quickly and easily found.*

- o Preferred funeral home name, address, phone number
- o Description of any prepaid funeral arrangements
 - Location of paperwork
- o Burial instructions
- o Burial location
- o Description of preferences for funeral program
 - Officiate

- Music
- Poems, readings
- Speakers
- Pallbearers
- Desires for organ or body donation
- Preference for burial or interment; cremation

Obituary

- Write out basic information found in most obituaries
 - Full name, including nickname
 - Birth date, place
 - Parents full names
 - Siblings full names
 - Marriages
 - Education
 - Designations, awards, recognitions
 - Employment
 - Places of residence
 - Survived by (list spouse, children, grandchildren, siblings, others)
 - Memorial funds or donation suggestions
- List of places to publish obituary
 - Local newspaper
 - Hometown newspaper
 - Professional organization newsletter