

# *Important Estate Documents*

*January is a great time, with a new year upon us, to undertake the task of assembling your important documents. This is a simple list of what type of documents should be kept in one consolidated place for estate purposes.*

## **The Essentials**

- Will
- Letter of Instruction
- Trust Documents
- Financial Power of Attorney (POA)
- 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
- Living Will
- Do-Not -Resuscitate Order

## **Life Insurance & Retirement**

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

## **Bank Accounts / Social Media**

- List of all bank accounts
- Individual brokerage accounts
- List of Safe-Deposit boxes
- List of all User names and passwords for various accounts

## **Proof of Ownership**

- Housing, Land and Cemetery Deeds
- Escrow Mortgage accounts
- Proof of loans made and debts owed
- Vehicle titles
- Stock certificates & Savings Bonds
- Partnership & Corporate Operating Agreements
- Tax returns

## ***Gleanings for the Hungry***

Email: [info@gleanings.org](mailto:info@gleanings.org)

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