

Information Check List

Legal Documents

- Last Will and Testament
- HIPPA Release
- Power of Attorney
- Living Will
- Trust
- Guardianship Designation if minor children

Accounts

- List of all bank accounts
- List of all user names and passwords
- List of automatic pay accounts with name and contact information of each payee
- List of safe-deposit boxes
- 401 (k) accounts
- IRA's, Roth IRAs
- Pension documents
- Annuity contracts
- Brokerage account information (name, contact phone number and e-mail address)
- Detailed list of savings bonds (and copies of actual bonds)
- Life insurance policies (private and through employer)
- Long Term Care insurance policies

Other Documents

- Housing, land and cemetery deeds
- Mortgage accounts
- Proof of loans made
- Vehicle title
- Partnership and corporate operating agreements
- Previous three year's tax returns
- Marriage license
- Divorce papers
- Military discharge information
- List of contact information (contacts on accounts, names, current addresses and Social Security numbers of all people named in the legal documents, as well as the contact information for the estate attorney and CPA who will be handling the estate.)