

# Documents you need...

Gather these documents in one spot for your heirs so they avoid any frustration and financial pain during a time of loss.

## The Essentials

- Will
- Trust documents
- Durable power of attorney
- Letter of instructions
- Military discharge papers

## Life Insurance + Retirement

- Life insurance policies
- Long term care policy
- IRA, SEP IRA, SIMPLE IRA
- 401(k), 401(b), 457 accounts
- Pension documents
- Annuity contracts
- Social Security benefit information (if applicable)

## Bank Accounts

- List of bank accounts
- List of usernames & passwords
- List of safe deposit boxes
- List of reoccurring bills & auto-payments

## Marriage/Divorce

- Marriage license
- Divorce papers

## Health Care

- Personal & family medical history
- Health insurance cards (medicare/supplement)
- Primary care/specialist contacts
- List of medications
- Durable health-care power of attorney
- Authorization to release health-care information
- Living will
- Do-not-resuscitate order
- M.O.L.S.T. form

## Proof of Ownership

- Housing, land and cemetery deeds
- Escrow mortgage accounts + home equity lines
- Proof of loans made and debts owed  
Vehicle titles
- Investment accounts (brokerage, stocks, & bonds)
- Partnership & corporation operating agreements
- Tax returns
- Digital assets (online accounts, crypto, digital property)

