

28 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

1. Will
2. Letter of instructions
3. Trust documents
4. Military discharge papers

Life Insurance + Retirement

5. Life insurance policies
6. Long term care policy
7. Individual retirement accounts
8. 401(k) accounts
9. Pension documents
10. Annuity contracts

Bank Accounts

11. List of bank accounts
12. List of usernames & passwords
13. List of safedeposit boxes

Marriage/Divorce

14. Marriage license
15. Divorce papers

Health Care

16. Personal & family medical history
17. Durable health-care power of attorney
18. Authorization to release health-care information
19. Living Will
20. Do-not-resuscitate order
21. M.O.L.S.T. form

Proof of Ownership

22. Housing, land and cemetery deeds
23. Escrow mortgage accounts + home equity lines
24. Proof of loans made and debts owed
25. Vehicle titles
26. Stock certificates, savings bonds and brokerage accounts
27. Partnership and corporation operating agreements
28. Tax returns

