Estate Planning Document Checklist

Preparing your estate can be a complicated process for both you and your loved ones. Use this checklist to help organize important documents and records. Fill in the blanks and/or add your own unique information.

Copies of Essential Documents

Make copies of the following documents:

- [ ] Driver's license
- [ ] Social Security card or Passport
- [ ] Medicare / Medicaid / health insurance coverage card
- [ ] Credit cards
- [ ] Mortgage records
- [ ] Legal Power of Attorney, Healthcare Proxy, Living Will, Advance Directives

Create a List of Important Contacts & Accounts

You'll need contact information for the following contacts, as appropriate:

[ ] Clergy members	
[ ] Attorney	
[ ] Financial Planner	
[ ] Tax Advisor	
[ ] Executor and/or beneficiaries	
[ ] Loans: contact info for all mortgage, credit card, personal loans or other.	
[ ] Condo or continuing care facility contact person	
[ ] Insurance agents	

Create a List of Where to Find Original Documents

It may be required to provide original documents instead of copies. Also notate the location of various documentation and other essentials.

☐ Safe-deposit box and key, along with a list of the contents and names of anyone who has access to it.	
☐ Any letter of instruction listing personal property not disposed of by will and wishes for distribution	
☐ Receipts and appraisals for valuables	
☐ Trust, banking and loan information	
☐ Tax returns	
☐ Insurance policies	
☐ Statements & other information about all investment and retirement accounts	
☐ Living will, medical directives or Durable Power of Attorney	
☐ Burial plots and desired funeral arrangements.	

Notes:

Gunness Financial Services - 2 Hope Ct. Barrington, RI 02806
(p) 401-270-5876 - (f) 401-270-1624 - larson@gunnessfinancial.com