# ESTATE INFORMATION - Outline

[Updated 11/2022]

**1. Contacts**

a. Estate Attorney
b. Financial Advisor
c. Bank(s)
d. Insurance Agent
e. Accountant
f. Doctors
g. Pharmacy

**2. Estate Documents**

a. Will
b. Trusts
c. Powers Of Attorney (original and on file at institutions)
d. Health Care Proxies (original and on file with doctors and institutions)
e. Funeral/burial arrangements; draft obituary; photographs for obituary
f. Long term care arrangements
g. Information on family dynamics (guidance)

3. **Property to be dealt with**

a. Investments/Brokerage Accounts/Life Insurance
b. Bank Account(s); safe deposit box
c. Real Estate
d. Personal property and other valuable assets, pets
e. Automobile

4. **Where to find things**

a. Jewelry and other items of value (market or sentimental)
b. Original executed documents (will, trusts, POA's, health care proxies)
c. Passport/medical/social security/insurance cards/driver's license, birth and marriage certificates
d. Credit cards
e. Bank and Investment Statements
f. Evidence of tax payments/tax filings - federal, state and real estate -
g. Insurance Policies
h. Real estate documents
i. Lists of friends/contacts
j. Lists of service providers, including utilities
k. Lists of passwords
l. keys

**5. Stop/Monitor/Pay**

a. Social Security/Medicare/supplemental health
b. Pension
c. Credit Cards
d. Auto-Pay
e. CableTV/internet/electric/water
f. Rent/maintenance/real estate taxes/income taxes
g. Insurance premiums (property/liability)
h. Social media

**6. Insurance**

a. Property and Liability (including driver's)
b. Medical
c. Professional

**7. Automobiles**

a. Certificates of title (pink slips)
b. Insurance

## Update Periodically