

# 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**