

Estate Plan Organizer

1. Emergency Contacts

Family Members, Pastor, Doctor, Dentist, Lawyer, CPA, Financial Advisor, Insurance Agent,
Power of Attorney – Healthcare and Financial (have address and telephone number)

2. Emergency Documents

- a. Living Will/ Advanced Medical Directive
- b. Power of Attorney- Financial & Healthcare
- c. Birth Certificate/ Marriage Certificate/ Passport or Citizenship papers/Driver's License number & Expiration/ Social Security card/ Adoption papers/other legal documents

3. End of Life Documents

- a. Will or Living Trust
- b. Military Discharge papers
- c. Safe Deposit Keys/ Combination for safe or keys
- d. Funeral Instructions (Service plans, Memorial Instructions, Burial Plot Deed, Funeral Home preference)

4. User Names & Passwords

- a. Online bank accounts/investment accounts/Bill Payment services
- b. Auto payment/ Debit accounts – (Dates & amounts withdrawn)
- c. Computer/E-mail

5. Letter of Instructions

- a. Executor/ Personal Representative/ Successor Trustee
- b. Guardians

6. Letters to your spouse/children-

7. Investment Documents –

- a. Investments statements (Mutual funds/ Brokerage accounts/ IRAs/ Retirement plans)
- b. Stocks/ Bonds held in Certificate form

8. Bank/ Credit Documents

- a. Bank Statements – Checking/Savings
- b. Credit Card Numbers/Debit Card Numbers/ Statements

9. Insurance Documents

- a. Life Insurance Policies/ Group Life Insurance
- b. Long Term Care Policies
- c. Health Insurance Policies
- d. Property & casualty Policies

10. Personal Financial Documents

- a. Mortgage documents/ Real Estate Deeds, other titles of ownership
- b. Tax Returns
- c. Motor Vehicle Titles
- d. Outstanding loan documents
- e. Medical plan cards/ record

