ESTATE RECORDS ORGANIZER

The best Estate plan is of little use if no one knows where to find the information or documents needed to execute it. Even if you don't have an estate plan, everyone has important paperwork and personal information. Use our checklist to help you organize records your records and give copies to your personal advisors, loved ones and/or executor.

Updated on ___________________ Copies given to ______________________________________

PERSONAL INFORMATION

Name	Birthdate	Social Security Number

CONTACTS

Name	Phone	Account Number (if applicable)
Accountant / CPA/ Tax Preparer		
Attorney		
Financial Advisor / Broker		
Insurance Agent		
Other		

ESTATE DOCUMENTS

Name	Date	Primary Contact	Location of Document
Will			
Living Will / Medical Power of Attorney			
Trust Documents			

Guardianship Documents

Power of Attorney (General)

EMPLOYMENT BENEFITS

Employer	Benefit	Location of Records

INSURANCE POLICIES

Company	Policy Type	Policy#	Phone	Location of Policy

Health / Medicare	**Identification #**	**Phone**	**Location of Records**

BANK ACCOUNTS

Institution	Account Type	Account #	Location of Records

INVESTMENT ACCOUNTS

Institution	Account Type	Account #	Location of Records

REAL ESTATE

Property Address	Mortgage Holder /Account #	Location of Records

RECIEVABLES (Loans or Rents payable to me)

Due From	Phone	Type / Amount	Location of Records

PERSONAL DOCUMENTS

Record for	Date/Place	Certificate #	Location of Document

Adoption Papers

Birth Certificates

Marriage Certificate

Divorce / Separation / Annulment Documents

Military Records

SAFE DEPOSIT BOX

Name Registered In	Institution/Location	Box #	Location of Keys / Code

CREDITORS

Type of Account	Company	Acct #	Phone	Location of Bills

VEHICLES

Make/Model	Vehicle ID Number	Location of Title, Registration and Maint. Records

PETS

Name	Type/Breed	Veterinary/Phone	Medications/Instructions

FUNERAL / BURIAL PLANS

Arrangements for	Primary Contact	Plan / Acct#	Location of Records