



## Important Information for Your Executor

### Legal Tasks

- ☐ Update your Last Will and Testament
- ☐ Update any Trusts
- ☐ Update your Living Will ("Health Care Directive" or "Medical Directive") document
- ☐ Update your Power of Attorney document
- ☐ Review beneficiary designations and account titles to see if they are worded appropriately

### Organizational Tasks

- ☐ Keep important papers in one place.
- ☐ Organize your important records so they would be somewhat self-explanatory to other people.
- ☐ Let your spouse, a trusted family member, or trusted friend know where your *Estate Information* is located.

## Contents of your *Estate Information* packet

- ☐ Your full legal name

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☐ Date of birth, location

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- ☐ Your address, phone numbers

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- ☐ Social security number

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- ☐ Parents names; mother's maiden name

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- ☐ Spouse and children names, addresses, phone numbers

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- ☐ Executor
- ☐ Name, address, phone number
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- ☐ Accountants
  - Names, addresses, phone numbers

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- ☐ Attorneys
    - Names, addresses, phone numbers

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- Description of services used

- 
- ☐ Last Will and Testament
    - Location of original document

- 
- Location of copies

- 
- ☐ Living Will
    - Location of original document

- 
- Location of copies

- 
- ☐ Power of Attorney
    - Location of original document

- 
- Location of copies

- 
- Type - general, durable, financial

- 
- ☐ Term Life Insurance policies
    - Insurance company name, phone number

- 
- Insurance agent name, phone number

- 
- Policy account number/ Value

- 
- Name of benefactor

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- ☐ Annuity Insurance policies

- Insurance company name, phone number

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- Policy account number

- 
- Short description of policy details -- values, purchase date, face value

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- Name of benefactor

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☐ Disability Insurance policies

- Insurance company name, phone number

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- Policy account number

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- Short description of policy details -- waiting period, monthly benefits, term of policy

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☐ Long-term Care Insurance

- Insurance company name, phone number

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- Policy account number

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☐ Medical Insurance

- Company name, phone number

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- Group number, policy number

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☐ Homeowners Insurance

- Insurance company name, phone number

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- Policy account number

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☐ Automobile Insurance

- Insurance company name, phone number

- Policy account number

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## **Your Finances/ Property**

### ☐ Checking and Savings Accounts

- Bank name, branch name, address, phone number

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- Account numbers/ Types

- 
- Names on each account

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- Location of bank statements, blank checks

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### ☐ Investment Accounts

- Name of financial institution

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- Account numbers/Types

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### ☐ Credit Cards

- Issuing bank name, phone number

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- Account numbers

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### ☐ Home Mortgage

- Current mortgage company (where payments go) name, address, phone number

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- Account number

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- Exact name on account

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### ☐ Home Ownership

- Location of deed, title, mortgage satisfaction proof

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- How home is titled (sole ownership, joint tenancy, tenancy in common, etc)

- 
- Exact name on title or deed
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☐ Loans

- Lending institution name, address, phone number
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- Account numbers
- 

☐ Credit Lines

- Lending institution name, address, phone number
- 

- Account numbers
- 

☐ Real Estate

- List of real estate holdings and rental properties
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- Location of records
- 

☐ Safe Deposit Box

- Name of institution, address, phone number
- 

- Names of authorized co-signers
- 

- Description of exactly what is stored in the box, including list of important documents
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☐ Safe

- Location of safe/ How to access contents
- 

- Description of exactly what is stored in the box, including list of important documents
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☐ Automobiles

- Location of original title
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- Exact name(s) on title
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☐ List of Creditors and Liabilities

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☐ Marriages, Divorces

- Names of current and past spouse(s)

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- Dates of marriage/Divorce

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☐ Adoption

- Location of adoption records

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- Brief summary of adoption

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☐ Military Service \*

- Location of military records, including discharge papers

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- Brief description of service

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- Brief description of any ongoing benefits

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- Ranks, awards

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☐ Veteran's Benefits \*

- Location of VA records

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☐ Social Security, Medicare

- Location of Social Security and Medicare records

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☐ Pension Plan

- Location of pension plan records

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- Brief description of benefits

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☐ Birth Certificate

- Location of original birth certificate

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- Exact name on birth certificate

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☐ Names

- List of all prior names, legal or otherwise

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☐ List of people who should be notified upon death

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☐ Desires for guardians for your children

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## **Funeral and Burial**

☐ Consider storing a copy of this section with your Last Will and Testament, or in a location where it will be quickly and easily found.

- Preferred funeral home name, address, phone number

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- Description of any prepaid funeral arrangements

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- Burial instructions
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- Burial location

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- Description of preferences for funeral program

- Officiate

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- Music

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- Poems, readings

- 
- Speakers
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- Preference for burial or interment; cremation
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☐ Obituary

- Write out basic information found in most obituaries

<ul style="list-style-type: none"> <li>▪ Full name, including nickname</li> </ul>
<ul style="list-style-type: none"> <li>▪ Birth date, place</li> </ul>
<ul style="list-style-type: none"> <li>▪ Parents/Siblings full names</li> </ul>
<ul style="list-style-type: none"> <li>▪ Marriages</li> </ul>
<ul style="list-style-type: none"> <li>▪ Education</li> </ul>
<ul style="list-style-type: none"> <li>▪ Designations, awards, recognitions</li> </ul>
<ul style="list-style-type: none"> <li>▪ Employment</li> </ul>
<ul style="list-style-type: none"> <li>▪ Places of residence</li> </ul>
<ul style="list-style-type: none"> <li>▪ Survived by (list spouse, children, grandchildren, siblings, others)</li> </ul>
<ul style="list-style-type: none"> <li>▪ Memorial funds or donation suggestions</li> </ul>
<ul style="list-style-type: none"> <li>○ List of places to publish obituary             <ul style="list-style-type: none"> <li>▪ Local newspaper</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>▪ Hometown newspaper</li> </ul>



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