



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

-
- Date of birth, location

-
- Your address, phone numbers

-
- Social security number

-
- Parents names; mother's maiden name

-
- Spouse and children names, addresses, phone numbers

-
- Executor
 - Name, address, phone number
-

- Accountants
 - Names, addresses, phone numbers
-

- Attorneys
 - Names, addresses, phone numbers
-

- 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
-

- Annuity Insurance policies

- Insurance company name, phone number
-

- Policy account number
-

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

- Name of benefactor
-

Disability Insurance policies

- Insurance company name, phone number
-

- Policy account number
-

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

Long-term Care Insurance

- Insurance company name, phone number
-

- Policy account number
-

Medical Insurance

- Company name, phone number
-

- Group number, policy number
-

Homeowners Insurance

- Insurance company name, phone number
-

- Policy account number
-

Automobile Insurance

- Insurance company name, phone number
-

- Policy account number
-

Your Finances/ Property

Checking and Savings Accounts

- Bank name, branch name, address, phone number
-

- Account numbers/ Types
-

- Names on each account
-

- Location of bank statements, blank checks
-

Investment Accounts

- Name of financial institution
-

- Account numbers/Types
-

Credit Cards

- Issuing bank name, phone number
-

- Account numbers
-

Home Mortgage

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

- Account number
-

- Exact name on account
-

Home Ownership

- Location of deed, title, mortgage satisfaction proof
-

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

-
- Exact name on title or deed
-

Loans

- Lending institution name, address, phone number
-

- Account numbers
-

Credit Lines

- Lending institution name, address, phone number
-

- Account numbers
-

Real Estate

- List of real estate holdings and rental properties
-

- 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
-

Safe

- Location of safe/ How to access contents
-

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

Automobiles

- Location of original title
-

- Exact name(s) on title
-

List of Creditors and Liabilities

Marriages, Divorces

- Names of current and past spouse(s)

- Dates of marriage/Divorce

Adoption

- Location of adoption records

- Brief summary of adoption

Military Service *

- Location of military records, including discharge papers

- Brief description of service

- Brief description of any ongoing benefits

- Ranks, awards

Veteran's Benefits *

- Location of VA records

Social Security, Medicare

- Location of Social Security and Medicare records

Pension Plan

- Location of pension plan records

- Brief description of benefits

Birth Certificate

- Location of original birth certificate

- Exact name on birth certificate

Names

- List of all prior names, legal or otherwise

List of people who should be notified upon death

Desires for guardians for your children

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

-
- Description of any prepaid funeral arrangements

-
- Burial instructions
-

-
- Burial location

-
- Description of preferences for funeral program

- Officiate

-
- Music

-
- Poems, readings

-
- Speakers
-

- Preference for burial or interment; cremation
-

Obituary

- Write out basic information found in most obituaries

- Full name, including nickname

- Birth date, place

- Parents/Siblings full names

- Marriages

- Education

- Designations, awards, recognitions

- Employment

- Places of residence

- Survived by (list spouse, children, grandchildren, siblings, others)

- Memorial funds or donation suggestions

- List of places to publish obituary

- Local newspaper

- Hometown newspaper



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